DOCUMENT RESUME

ED 149 484 EA 010 305

TITLE	Take Time to Plan . . . An Anthology for Educational Office Personnel.
INSTITUTION	National Association of Educational Secretaries, Arlington, Va.
PUB DATE	77
NOTE	144p.
AVAILABLE FROM	National Association of Educational Secretaries, 1801 North Moore Street, Arlington, Virginia 22209 ($4.95)
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	Diaries; Educational Administration; Elementary Secondary Education; Employer Employee Relationship; Higher Education; Listening Skills; News Writing; *Occupational Information; *Office Management; *Office Occupations; *Office Practice; Organizational Communication; Professional Recognition; *School Secretaries; Task Analysis; Technical Writing; Work Attitudes
IDENTIFIERS	National Association of Educational Secretaries

ABSTRACT

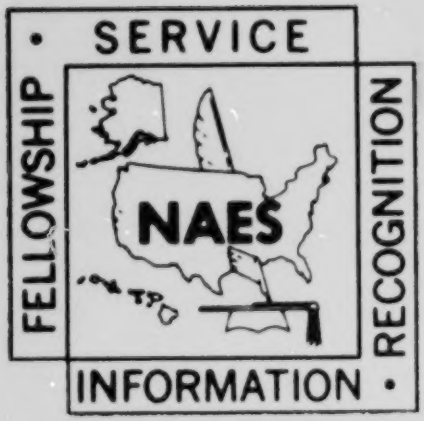
Since the position of the educational office employee is unique, there has been little formal education available other than the basic office skills. It has been necessary, therefore, for employees to learn on the job and to provide their own specialized training. This specialized training has been met by office personnel through the National Association of Educational Secretaries (NAES) and its affiliated associations that sponsor inservice training, workshops, and institutes throughout the nation. This publication includes subjects that will be of interest and assistance to all office personnel in education. Guidelines are offered for preparing a job procedure manual; relating to other employees, supervisors, and the public; and career planning. Formats and checklists are also provided for office communication including report and feature writing, and taking minutes of meetings. An index is included. (Author/MLF)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED149484

Take Time To Plan . . .

An Anthology for Educational Office Personnel



U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

NAES

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

Published by:

National Association of Educational Secretaries
1801 North Moore Street
Arlington, Virginia 22209

EA 010 305

TAKE TIME TO PLAN . . .
An Anthology for Office Personnel in Education

Copyright 1977 by

National Association of Educational Secretaries
1801 North Moore St.
Arlington, VA 22209

References to and quotations from this publication are encouraged; however, no part of this book may be reproduced without permission of the National Association of Educational Secretaries.

Any views or recommendations implied in this book do not necessarily constitute official policy of the National Association of Educational Secretaries.

Printed by
PMS Litho/Graphics
11936 East Washington Boulevard
Whittier, California 90606

U.S.A.

INTRODUCTION

To the thousands of educational office personnel who daily perform duties with dedication and pride, this publication is written . . . for you and by you!

A committee was appointed to undertake the preparation of a publication. Revisions of material from previous Association booklets and new contributions are included in this anthology.

Educational office personnel, regardless of their special scope of work or type of institution, are involved in a unique profession in which "accountability" is being demanded of everyone. This mandates a continual need to recycle ourselves through up-to-date information, attendance at workshops and conferences, and inservice sessions.

It is hoped that this anthology not only will give additional information concerning various aspects of our work, but will also motivate you to improve attitudes and skills. The job you save may be your own!

The Publications Committee, contributors, the Board of Directors of the National Association of Educational Secretaries, and others who assisted are to be commended for completion of this manual.

Mrs. Mildred Hughes
NAES President, 1975-76

Dedicated to

Louise Henderson Nelson, Founding President of the National Association of Educational Secretaries, who encouraged professionalism among educational office personnel in our Nation's schools. It is also dedicated to all members of NAES who have committed themselves to professional growth and recognition of educational office personnel as members of the education team.

Publications Committee

TABLE OF CONTENTS

SECTION I BE WELL ORGANIZED 1

Chapter 1 Know Yourself 3
Dr. Marion T. Wood, New Hampshire

Chapter 2 Prepare Your Procedure Manual 13
Janice Fleming, California

Chapter 3 Know Your Boss 21
Dr. Marion T. Wood, New Hampshire

SECTION II LEARN TO COMMUNICATE 31

Chapter 1 The Content of Written Communications ... 33
Mary Tramel, California

Chapter 2 Listen Attentively 51
Virginia Mathony, California

Chapter 3 Write Minutes with a Purpose in Mind 57
Catherine Sullivan, Mississippi

Chapter 4 General Features of a Good News Story 75
Mary Tramel, California

Chapter 5 Write Clear, Concise Reports 85
Virginia Mathony, California

SECTION III GIVE YOUR BOSS A HALO 93

Chapter 1 Promote Your Boss's Philosophy 95
Jean Faulkenberry, Texas

Chapter 2 Support Your New Boss 99
Jean Faulkenberry, Texas

SECTION IV LEARN TO BUILD SELF-WORTH 103

Chapter 1 The Secretary and Human Relations 105
Erma Johnson Hawkins, Mississippi

Chapter 2 When It's Time to Move On 115
Jean Faulkenberry, Texas

Chapter 3 Turn Threats Into Opportunities 117
Doris Barnes, Virginia

Table of Contents, cont'd

SECTION V PLAN YOUR CAREER 123

Chapter 1 Be Your Own Person 125
Vivian Valentine, Mississippi

Chapter 2 Be A Professional 133
Thomas F. Nolan, Jr., Connecticut

Chapter 3 Profile of an Executive Secretary 137
Erma Johnson Hawkins, Mississippi

NAES — What It Is and Who It's For 141
About the Authors 141
Index 143
NAES Publications 145
. 149

Educational Office Personnel are unique . . .

From time to time the National Association of Educational Secretaries (NAES) has published materials for individual use and for use in its sponsored programs. As are all NAES publications, projects, and programs, this book is a result of the cooperation of many sharing their knowledge for the benefit of others and the profession.

Since the position of the educational office employee is unique, there has been little formal education available other than the basic office skills. It has been necessary, therefore, for employees to learn on the job and to provide their own specialized training.

This specialized training has been met by office personnel through NAES and its affiliated associations which sponsor inservice training, workshops, and institutes throughout the nation.

Through persistent efforts of NAES and its affiliated associations, a limited number of classes finally have been established through continuing education programs -- classes that offer credit toward an A.A. degree in Educational Secretary.

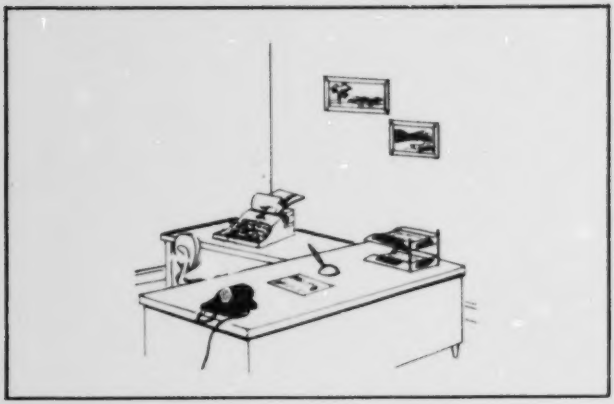
This publication includes subjects that we think will be of interest and assistance to all office personnel in education. The material is indexed for easy reference when memories need jogging. Throughout the publication where the word "secretary" is used, it is meant to include all office personnel regardless of specific titles given by the administration, and at no time do we wish to infer that all administrators are male and all secretaries are female.

Special appreciation is extended to those who contributed to the content of the book; to those who read the manuscripts and gave their support: Dortha Voruz, Mona Smith, and Mildred Hughes, President, President Elect, and Past President, respectively of NAES; to Mary Koehler, Executive Assistant to the President, California State University, Fullerton, California, who served as Advisor to the Publication Committee; to Ruth Randle, Attendance Clerk III, Pioneer High School, Whittier, California, for proofreading assistance; to Thomas D. Faulkenberry, graduate student at Texas A & M University, College Station, Texas, who provided art work; and to Pearl M. Spear, owner of PMS Litho/Graphics for her assistance on lay outs and art work.

Virginia Mathony
Publications Committee Chairman

Section I

BE WELL ORGANIZED



1. *Know Yourself*
2. *Prepare Your Procedure Manual*
3. *Know Your Boss*

Chapter 1

KNOW YOURSELF

Marion T. Wood

"The secretary's day is packed with the unexpected."

You are a builder

You are a builder, a builder of educational opportunities. And to build is a satisfying thing; to build in education is the most satisfying of all. What do you as a builder do? You organize! First, you make a plan; then secure materials, the very best, then you work your plan -- the action begins.

In a measure, this is what each of you do either consciously or unconsciously. Some plan better than others; many stick to their goals through thick or thin. But as you look back over each day, somehow, some way, you have followed some kind of plan. How can you improve that plan and "grow as you go"?

Planning in an office, particularly in an educational office, is not the easiest thing to do. First, the load is a "people load." So often Martha Luck, a past president of the National Association of Educational Secretaries and former dean of the Evening Divisions at Northwestern University, has said, "It's not the paper load, THAT we can manage; but it's the people load that creates the challenge."

There's another reason that complicates our daily planning. In most offices secretaries are not truly free agents. The office day is controlled by the direction of another. On the supervisory level and on up through the administrative level a person is allowed to use personal devices for getting work out. The one in charge has full control of office time, personal energy, and even has time for thinking.

You, the secretary, are caught between the order of your day and the direction you receive. Being a secretary is far from being involved in a fixed science; the secretary's day is packed with the unexpected. Yet, although the day is played by ear, there's a common sense way of exerting more control than you may realize. Some call it charting the course; others say, log your day. Only as you see a summary of the week's activities can you determine the place and the job that requires most of your time. Only then can you establish priorities that make "work smarter, not harder" feasible.

Log your day

Logging your day is simply keeping a diary of office activities for a given period. Take a piece of paper long enough to vertically list your day into 15 or 30-minute periods. Across the top of the page, list all your major responsibilities. Leave a column for interruptions so that you can record the time they require. At the end of two weeks, you will discover how your time is being spent.

Your first reaction to this logging will be, "I haven't time." You say that because you are comfortable with old habits and down under you don't want to change things too much. A log may, and probably will, involve change. Actually, keeping a log will take only a few minutes from each hour of your day and facts you have at hand will improve your procedures and even assist you in making suggestions that will smooth the work flow.

At Keene State College, the office personnel in the Alumni Office were asked to keep such a record for two weeks. At first they felt it a burden. "Too much trouble," they said. But the goal of convincing the administration that more help or better equipment was needed kept them at the task. In just a few days they found areas where jobs overlapped; they saw ways of improving their filing system and they even discovered some short cuts for mail room procedures.

Peter Drucker, a management specialist, suggests that a time log is necessary because changing habits requires more conviction from most office personnel than merely reading about the experiences of others. You need a log to show you how to get rid of some of the things you shouldn't be doing. An IBM manager once told his rule for establishing priorities: Divide your activities into three groups. In the first group, list those that must be done. In the second group, put those items that ought to be done; and in the last group, place all those things you shouldn't be doing. It's this last one that trips us! Are you doing things because you really like to do them? And are they the things you should delegate to another?

Establish your priorities

Lyndon Johnson, during his White House days, made this remark: "We constantly put second things first." He could have been speaking about educational office personnel. Are you guilty of putting second things first? If you did it only once that wouldn't be too bad. Check yourself! Today, as you approached your desk, what did you select to do? Did you think of your priorities and select the most important? Or did your attention move to the most interesting thing on your desk? Do you rationalize that getting the interesting things out of the way clears your desk for the more important tasks? This can lead to spending the whole morning "getting organized" only to find the morning has melted into the afternoon with the essentials still undone.

When establishing priorities, take a look at your habits, even the comfortable ones. They may be creating the bottle neck! Look at this list; do you find one of your problems here? These are some of the reasons why people procrastinate.

Too much routine work
Too much reading
Too many meetings
Too many interruptions
Too many visitors
Too many social demands
Too little information
Too much indecision
Too little authority

Take corrective measures over those habits and situations you can control; and those you can't control? Set up a meeting with your supervisor. Together, you should be able to determine some procedures for improved work flow. Better still, make some suggestions of your own and present them to your administrator.

Indecision

Fear is sometimes a problem. Even the smallest decision involves some risk. You need confidence in your decision-making ability and that requires practice. Unless you are decisive, you'll find yourself living in a world that exists between "do it now" or "put it off." Such an existence tends to lower your energy. Norman Vincent Peale tells us to pick the area where procrastination plagues us and conquer it!

Don't be like the secretary who didn't like math. Anything to do with sums went to the bottom of the pile to be done later; and sometimes later never came. One day she saw the light, and decided to take a math course to improve her ability to handle figures. Now reports with sums no longer bother her or delay her output.

It may be the lack of familiarity with a new machine that stalls you. Study the machine manual or better still, find someone that will show you how to run the machine.

Slow reading

If reading is your problem, take a course in developmental reading and learn how to speed up your reading skill. Much of your reading can be done quickly if you learn to skim. It is quite possible to skim a news article of 1,000 words in less than two minutes by reading the first paragraphs. Check carefully the concluding paragraph because this is where the author usually summarizes the main points. You may not get as much out of the article as if you had read every word, but you'll gain a surprisingly good understanding of the contents.

Examine titles and subtitles. What do they tell you about the report? For instance in the essay, "Americans Can -- and Should -- Live Longer" the author tells you in the title what the message will be. Reading the article, you find the author feels three things contribute to the American's short life: overwork, overworry, and overindulgence. Turning a title into a question motivates you to find the answer from the reading, improving not only your concentration but your retention.

You learned in high school that every paragraph carries a main idea. Most of the material you read is written in expository structure. This means the main idea will be expressed in the first sentence of the paragraph. Probably a good 80-90 percent of the material you read is written in this style. Sort out the main ideas from the supporting ideas -- many times all you will need are the main ideas.

It is true that sometimes the main idea isn't stated directly but will be a sum of a number of supporting ideas and the relationship between them. This writing style is difficult reading and cannot be handled as rapidly as the expository style.

Words can cue you to the author's meaning. When you see a "for example" you can usually skip what follows

because the illustration is merely an elaboration on the point the author is making. AND, LIKE, LIKEWISE, MORE, MOREOVER, ALSO are "go ahead" signals. They indicate more of the same is coming. Signals that show the author is changing thought or direction are: BUT, YET, HOWEVER, OTHERWISE, ALTHOUGH, IN SPITE OF, ON THE CONTRARY, HOWEVER. The skilled reader exploits the work signals and signs the author uses.

You can improve your own reading rate by a very simple exercise. Take a short column, such as a newspaper column or one from the **Reader's Digest**, and draw a line down the middle of the column. Now, read down the line you've drawn taking in as many words as you can without looking at one side of the line or the other. It may sound difficult but persist and you'll be surprised how much information you pick up by just reading down the middle.

Too many visitors and social demands

Set some deadlines for yourself. Try the paper clip story to help you organize your time. Med Serif, who has written much on time management and self-management, completed his master's thesis while holding down a full time job. No simple feat! He decided to do five pages each night. So he put five paper clips in a coffee cup. When he took the fourth clip from the cup, his wife agreed to make coffee and prepare a snack.

The first night he was far behind his schedule, his wife finally gave up and went to bed. The second night he was only 30 minutes behind schedule. The third night, he was on target and each night thereafter, he remained on target.

Set goals and don't let perfectionism postpone the job. If you haven't enough information or you do not understand something, seek help. Remember, it wouldn't be your job, if you were not considered competent to do it.

Too little authority

Getting started can be the most difficult of all. Do you have the authority to go ahead? Then get started. If it is a big job like Serif's thesis and requires a huge block of time,

don't wait until you can sort out that much time from other responsibilities. Take your cue from the paper clip story and divide the job into small assignments and BEGIN. There's magic about picking up a job on which you have a "head start."

A change of pace releases built-up tension. Pick up work that can be easily completed and requires less effort. Even if the deadline is right on you, a short break from the job is still the best way to recharge your batteries. Splash water on your face, apply fresh lipstick, change the environment for a few minutes. It's the pause that stops the wheels from spinning -- that prevents the frustration that comes from the feeling, "the harder I work, the behinder I get."

Too many interruptions

Try batching your work. If you have transcription to do, do it all at the same time. And select the one best time for this activity. This is said somewhat with tongue in cheek knowing full well that your selection of a time is dependent upon direction from your supervisor.

Outgoing telephone calls may be batched. You may not be able to control incoming calls but you can select the best time to make outgoing calls. Generally, it is mid-morning. If you know the habits of people you are calling, you can save frustration by calling them when you know they are apt to be at their desk. If you wish to phone Mr. Mallat, who is in charge of buildings and grounds, call him before eight in the morning as his responsibilities require his moving about campus during much of his working day.

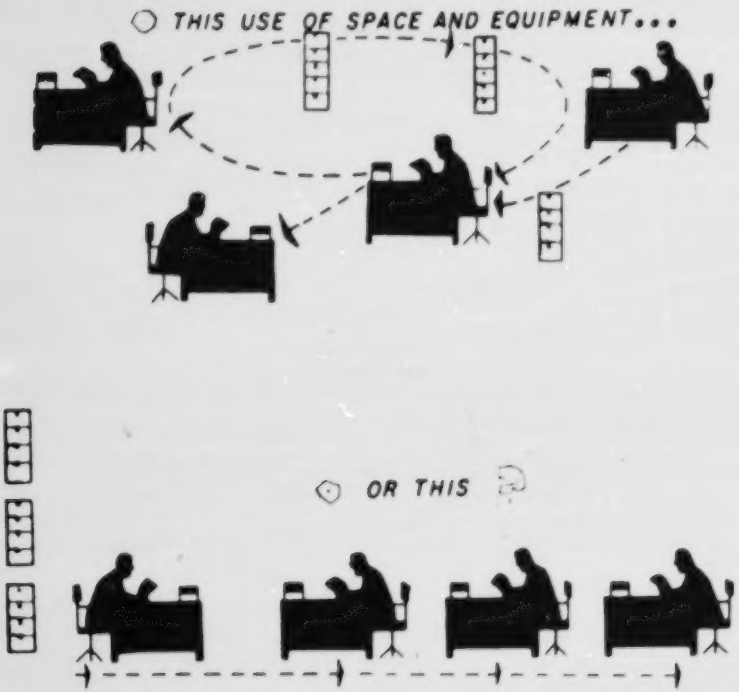
The simple matter of a letter signature can be batched with others for greater efficiency and even security. Have you seen a letter book? This is a bound book with blotting paper for pages. As letters are prepared for signature, they are placed between the leaves of this book. At the end of the day, the entire book is left on the desk of the originator for signatures. In addition to cutting down on interruptions, it also provides security from prying eyes.

Too little information

Have a place for everything you use and keep your supplies well organized. What's more, put things back when you finish with them. It takes only an instant to return something, but it can require hours of searching to find a supply that is not in its proper place.

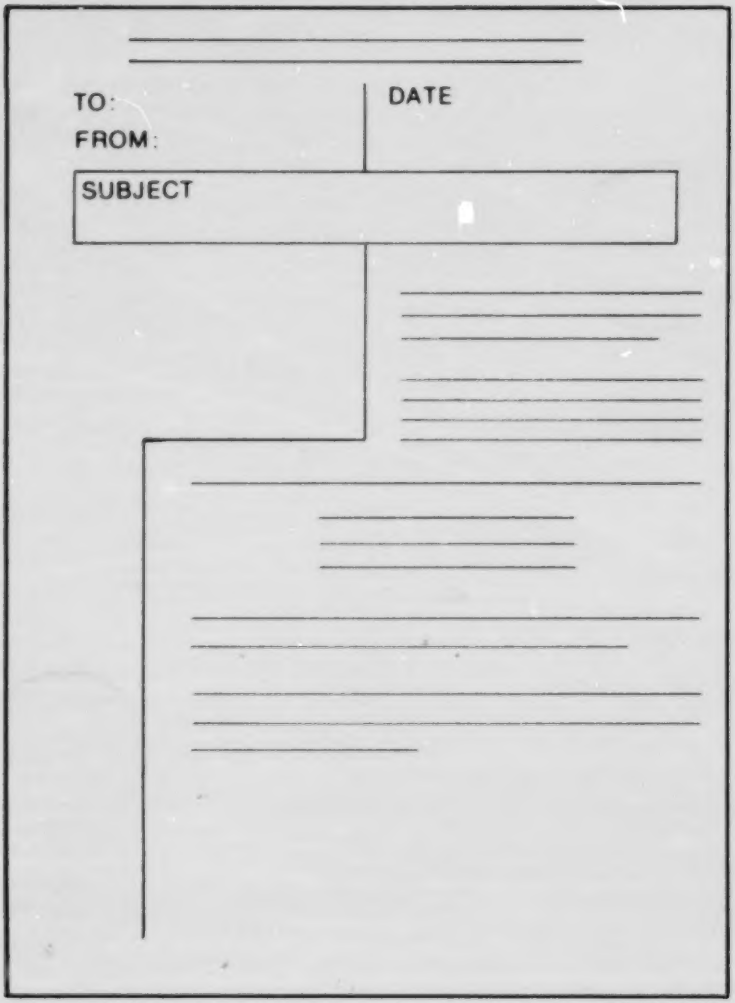
Arrange files and desks for smooth work flow. Reference books should be within easy reach. Frequently called phone numbers should be accessible. Keep similar jobs in file folders. Use forms for those frequently issued communications.

WORK FLOW PATTERN



Keep the work area of your desk free. Clutter is distracting and should be kept to a minimum. Place the supplies and information you need for a specific job close to your work area. Transportation time is non-productive.

Angie Holms, a former president of the National Association of Educational Secretaries gave her student workers a simplified format for notices she asked them to type.



Too much routine work

The "no-file" system is a saver of effort. When a document is originated, determine whether or not it requires action. If it is issued for information only, it can be discarded as soon as the information has been assimulated. Only action documents are filed.

The time and date of a message can be extremely important in making a decision. It is sometimes needed information in a legal case. Therefore, date and time everything. Even the memo that seems temporary may be held longer than you originally anticipated.

Specialization

Letter writing is an art and writing effective letters comes with practice. Study the correspondence that goes from your office. When you find an effective paragraph, transfer it to a card. Soon you will have a group of effective and appropriate paragraphs phrased in the language of your administrator.

You will be impressed with the time that model letters can save. A secretary in an IBM office in Minnesota handles the correspondence for about 70 people. She does it with organization and two Mag Card typewriters. She researched and found the most commonly used letters. These she typed and placed in a loose leaf binder. Each letter was given a code number. When anyone in the office needs a letter or document written, all they have to do is to give her a code number, personalize the copy and her Mag Card typewriter types out the letter at 150 words a minute. This is true specialization; it is also organization.

Specialization may be the way to organize your office. You may wish to divide the typing and non-typing functions so that one person handles all the typing and another handles the non-typing activities. In a two-secretary office, for example, all the typing was done by the junior secretary who was a specialist on the IBM Mag Card "Selectric" Typewriter. She handled the transcription of three men's dictation without working over time or allowing a backlog to develop. When revisions were necessary, the typist had only to keyboard the changes and additions while the unchanged text, already recorded, typed out automatically at 150 words a minute.

The remaining functions of the office -- maintaining the files, telephone coverage, coordinating schedules, and providing the necessary follow-up was the sole responsibility of the other secretary. This secretary rarely used a typewriter which freed her to assist with the many routine responsibilities in the office. Such a system balances workloads and offers maximum use of personnel and superior utilization of equipment. Its success hinges on careful planning -- the point we're discussing.

Specialization is another way of saying **delegate**. It's not easy to delegate. Often you know you can do it better and even faster yourself. Yet, there are the other jobs that demand your time and attention, so you must have confidence and delegate to another. Lack of knowledge of the other person's talents, lack of experience, disorganization, immersion in trivia are all barriers to delegation. One time a former secretary, Doris Andrews, was asked to write a report. She came back with a splendid report. When she was complimented she replied, "I like to do this kind of work." A job that was demanding for one was exciting for another.

The psychologist, William James, once said that most people tend to operate on about one-tenth of their ability. When you have a good job, a normal social life, it is easy to feel you have a full schedule. It's easy to let time slip by; it's easy to procrastinate, it's easy to become shortchanged on valuable hours and minutes. Yet, if you are to grow professionally, as was said in one of our NAES meetings, you must "grow and go." This requires taking a good, thought-provoking look at how you organize your day. When a minute or two is saved here and there; when you do first things first, you know the hours will take care of themselves.

A philosopher once said that mediocrity is self-inflicted and genius is self-bestowed. So here's to you! Why not start today to become a genius!

Chapter 2

PREPARE YOUR PROCEDURE MANUAL

Janice Fleming

"Your administrator will be grateful for a handy reference."

WHY?

"Why me?" "I have been on this desk for eight years. I know my job thoroughly!" Exactly! But take a minute and think back to your first weeks on your desk. Did you enter the educational field as a substitute? Had you been employed in industry before becoming an educational office employee? Or, was this your first job after gaining your education?

Rare indeed is the school district which can provide "training time" for a new employee. The knowledge and understanding you gained must, therefore, have come from "trial and error," endless questioning and osmosis. And that is often a long, difficult, embarrassing, and frustrating road.

How sweet it is for a substitute or new employee to follow a thoughtful predecessor who has been wise enough to formulate a desk procedure manual.

Lest you feel, however, this is a purely pragmatic exercise on your part, as you intend to stay on your desk for ever and ever and never, no never, become ill -- let us look at additional benefits. Depending upon the size of your office or school, there may be other employees with whom you work. Some school districts have restricted substitute assistance to long term absences (longer than three days, for example). In the meantime, other employees have to cover the responsibilities of the absentee's desk. If the procedures on your desk are fairly simple and clear to all, no serious problems would arise, but it is difficult to imagine such a position exists in an educational office. Therefore, a simple, clear documentation of procedures would help to keep the whole office "cool" under the stress of a missing member of the team.

Is your administrator or supervisor truly knowledgeable regarding the scope and depth of your contribution to the

office function? Are YOU really aware of how much you do? The consistent reaction of administrators to well-documented desk manuals has been amazement at the amount and variety of work performed by their office employees. That bottom line on job descriptions, "and other duties as directed," covers a multitude of activities rarely recognized. You will find your administrator or supervisor will be grateful for a handy reference, as well.

Do you have an annual evaluation? Imagine the impact when you can present your up-dated desk manual for inspection. And then there may arise that fateful day when your district may send in an "independent evaluation team," "time study group," etc., for purposes of reclassification study. Have you ever been asked to list your duties? The table of contents of your desk manual is a complete outline of your responsibilities! And, you don't shortchange yourself!

Convinced? Now that you know the "whys," let us look at the who.

WHO?

Who should plan the procedure manual? Obviously, educational office employees work in many different types of situations: large high schools; small elementary schools; district offices; large districts; small districts, etc. Therefore, the first decision which must be made concerns the type of manual you feel would be most effective. If you are in a very large office where several employees are engaged in similar activities, perhaps a joint effort would be more successful in producing a manual covering several positions. In some districts, the decision has been made to produce one comprehensive office manual for all elementary school secretaries, for example. This becomes a committee effort which could include administrators and office employees. However, if you are in a smaller district and know employees in other schools who share similar duties as your own, perhaps a joint effort would be practical. The superintendent of a California school district was so impressed with a workshop on procedure manuals presented by the California State Association, he mandated manuals for all clerical positions and suggested his employees form committees to implement the project. Information common to all employees was collected by committees, duplicated for all employees' manuals, and a common format was adopted. This motivated all employees with a "head start." The other

"motivation" was a schedule of deadlines for completion which was established by the superintendent!

Our discussion here, however, is really directed to YOU, the responsible office employee who recognizes the need for describing your own unique position and duties. YOU are, by far, the most qualified person to produce your desk manual!

HOW?

"Where in the world do I start?" "Where am I supposed to find the TIME?" First, you start TODAY! You know, you could eat a whole elephant, one steak at a time. Don't panic! Rome wasn't built in a day and a good office procedure manual does not evolve over night. Take one step at a time. You are starting to compile a living, changing, contemporary document, which will never really be "completed." At least, not if you keep it up to date.

Step 1. Keep a note pad on your desk and each time you perform a task--jot a little note to yourself. Such as: "typed purchase requisitions," "registered new student," "typed work order for maintenance," "ordered field trip bus," "fire drill reports," "called personnel re insurance," "parent complaint call," "ordered office supplies," etc., etc. It really takes only a couple of seconds to jot notes to yourself. You may go through this process for a whole school year! We all know there are tasks we perform daily, weekly, monthly, and yearly and none of us can recall **all** of these functions until we are called upon to perform them.

Step 2. As you continue your idea list, take a couple of minutes each day or once a week to type your duties on individual 3" x 5" file cards. Start your filing system for future organization of your manual. At the same time, if your task requires completion of a form, start a file of these forms, numbering and cross-referencing them as exhibits. If you have a high E.Q. (efficiency quotient) you may wish to skip Step 1 and make your listings directly on your 3" x 5" cards!

At this point, you will begin to feel some challenge and excitement, because the vision of what you are going to accomplish will fire your imagination and a difficult task will become an "ego-building game."

In addition to your note taking activity of day to day tasks, take time to do some constructive brain-storming. Use the age old devise of who, what, where, when and how.

Who am I? Include a formal job description.

Who are the other members of the staff? List the names and brief descriptions of the functions of the employees in your school or department. Include a personnel diagram of your school or district office. Show how you all fit into the "team."

Who are the people you contact frequently in the district office or other schools? Briefly describe the reason for the contact and how to reach each person.

What are district policies or state laws which affect your particular position?

What are your working hours, breaks, and lunch period?

What are office regulations in your district regarding smoking and/or coffee at the desk?

What emergency procedures do you follow in case of illness? Who do you notify and how?

What are procedures regarding keys and responsibility for locking the office?

When does your supervisor or administrator prefer making appointments or seeing visitors?

When are office supplies ordered and who orders them?

When is mail picked up and where? When is it delivered?

Where are various office machines located? Where are instructions and maintenance manuals filed?

Where are the files related to your position? Is there a guide to the system?

Where are supplies stored?

How does your supervisor or administrator prefer telephone contacts to be handled?

How do you handle visitors who are waiting?

You see, the questions go on and on and give you a basis for recalling the information which would be extremely helpful, if not necessary, for a substitute or replacement.

One elementary school principal tells an amusing, but unbelievable story, regarding a substitute who was not answering the telephone during the morning of her first day. Finally the exasperated principal asked her why she would not answer the telephone and her answer was, "Ninety percent of the time it is for you." Fortunately, this is a very

unusual situation, but there are many far less obvious ways in which a substitute or new employee could flub the first days through merely a lack of knowledge of duties. Let us assume, at this point, that you have compiled a very respectable amount of information and need to begin organizing your manual.

Step 3. Nothing tops the three-ring binder. The advantages for revision and up-dating are obvious. Assign a page for each subject. Group your duties under general headings which make sense to you. Start inserting your narrative or outlined method of explanation for each topic. Collate the material with the exhibit forms you have been collecting to support the action you are describing. (One workshop group emphasized the importance of accurately completing any forms for guidance.)

Step 4. Complete your table of contents. Remember, your table of contents can be a great assistance when requested to list duties for evaluations or time studies, so make your table a very complete document.

Step 5. Probably the one most valuable item of information you can include is a deadline schedule. This will almost have to wait until the end of a complete school year, but it will certainly begin with the pre-opening duties and carry through until your particular job is completed at the end of the school year. You may wish to place your duties in categories of weekly, monthly, and summer deadlines, or perhaps a complete running calendar year. In any event, a substitute or new employee can only be effective if informed of the obligations to meet deadlines. This schedule should be placed directly behind your table of contents and clearly tabbed.

Keep your manual as simple and succinct as possible. Long involved explanations will tire you and bore your reader, but be sure and "tell it like it is." If you can manage supplies, clear plastic protectors are an ideal way to display your exhibit forms. Clear plastic tabs are attractive for your divisions and color coding might make an attractive and convenient way to find items easily. If you have the **File It Right System** (or even your own system) color coded, correlate your files and your manual.

Only you can determine how extensive you wish your manual to become. Some creative office employees have

included "helpful hints" they have discovered or collected through the years. Some have included excerpts from professional publications on work habits or personal growth ideas. Again, one very essential way to extend your manual is to relate it to your filing system. Of course we hope every educational office employee has adopted **"File It Right,"** but even your own system should be keyed to your manual. Include a "guide" to your files and explicit instructions where to find what.

Your reference library

How about that reference library? Have you collected an adequate library of needed publications to assist you in your position? Are your dictionary, district policies, employee handbook, state education laws, telephone directory, clerical handbooks, etc., all in one handy, visible location? So much time can be wasted hunting such items if they are casually stored "somewhere around the office."

Your work station

How recently have you taken a good look at your work station and evaluated it's efficiency and comfort (your comfort)? Educational offices range from "bare bones" to "downright plush" depending upon many factors. Some office employees work in a closet -- others in an industrial designed showcase.

Recently a poster appeared which proclaimed, "Bloom where you are planted." To work happily and efficiently you need to be located in a pleasant and convenient situation. How often do you move the furniture at home? Enough so the family dreads coming home in the dark? You do this to alleviate boredom, or in an attempt to find more convenient ways to arrange your living area, or to give yourself a "lift." You spend more sustained time in your office environment than any other location and its appalling the uncomfortable, awkward arrangements some employees endure. A well thought through arrangement is not difficult to sell to a supervisor.

Granted, some work areas are over-crowded and inadequate, but some creativity can at least allow for a few comforts. Have your files as near your desk as possible and adequately labeled. Have a working agreement with your administrator or supervisor regarding the purging of those files so you have room to expand during the year and keep your files loose enough that you don't have to "stamp down" the contents to add one more piece of paper.

Out of desk space? Hang that reference library on a shelf on the wall. Add a potted plant! Call on your woodshop teacher to build organizers for your desk tops. One school workshop took this on as a project and created peace from insanity for school secretaries. Get rid of excess "junk" that seems to accumulate around offices. Just clearing the decks often makes rooms seem larger. Storage problems are always with us, but often the school custodian knows some cozy little nooks where boxes can be stored. If it is something you might need in the future, jot down the contents and location in your procedure manual and be sure to list contents on the outside of the box. These are all hints which most employees know, but often as the days and weeks go by, we tend to absorb unsightly and uncomfortable situations simply because it takes time to do something about them. So do something nice for yourself and take a long, hard look at your surroundings and make them convenient and comfortable. You're entitled!

Take that first step TODAY! Jot down the first thing you do this morning at your desk -- and you will be on your way! A year from now you will be the proud possessor of a beautiful procedure manual, admired by your contemporaries, appreciated by your administrator! You can even be ill for a few days and not have to worry about what is taking place in the office! Sounds great? Good luck!

KNOW YOUR BOSS

Marion T. Wood

"Acceptance of an idea requires a process of digestion."

Know thyself -- and know thy boss! Generally, administrators are fine and happy people. They are not born happy, they are made happy. You help your boss to be happy by learning the things that relieve tensions and pressures. You learn to recognize the moods of the supervisor; to predict reactions. You sense the strengths and the weaknesses of the people with whom you work. If they are aloof or reserved, you complement them by being cordial to the people who visit the office. If your superior is one who works at a fast pace, use special care in checking details to see that nothing is overlooked. Make a note of the things discussed when you take in the mail; later, discuss them when the time seems right.

If your boss likes morning coffee, bring the coffee to the desk without having to be asked. Handle the incoming calls yourself even though they are not normally your assignment. Watch, listen, and ask questions about the kind of housekeeping duties that will provide a desirable working climate. These are part of your job.

Arrive at the office first. Keep a duster handy and if your desk and that of your administrator needs dusting, dust them. If there is a thermos bottle in the office, fill it with fresh water and make certain the glasses are clean. Water plants, replenish the supplies such as scratch pads, paper clips, and sharpened pencils. Keep storage cabinets clean, neat, and well arranged.

Don't try to reform the boss. If even right-hand margins are requested, make your right-hand margins even. If interruptions set blood pressures boiling, find ways to avoid them. If Mr. Williams, the one in charge, chooses to answer his own phone, even if it seems impractical, let him. If he becomes angry when you correct mistakes, carefully find ways to correct them.

Mental digestion [1]

You and your boss may not always agree. Mrs. Principal has made it plain that she will welcome suggestions and opinions even if they are different from hers. So you take her at her word and disagree -- only to make her angry. As you make a quick retreat, you wonder, did she really mean what she said! Could you be wrong? Or did you use the wrong approach?

Maybe you didn't take time enough to develop the answers to all the objections. Did you really do your homework before you made the suggestion? Was the suggestion timely? Don't disagree with her when she's feeling depressed, irascible or ill. Be sensitive to storm signals in facial expressions, in posture and in tone of voice. No matter how great your suggestion, if the recipient is not in the mood to listen, all is lost. Don't disagree with a person when that person appears concerned about something. There's no point in trying to talk to a person who is twitching with impatience. You will not be heard.

The acceptance of an idea requires a process of digestion. The mind has to digest ideas, facts, figures, plans, and proposals just as the stomach digests its food. Failing to allow time for mental digestion, may thoughtlessly give your co-workers and your superiors severe attacks of mental indigestion!

In rather unscientific terms, there are three stages to the digesting of food. The first is mastication which takes place in the mouth; second, is the churning action that goes on in the stomach. During this time, the food is mixed with digestive juices. The third stage, is the absorption of the nourishment into the system.

Like physical digestion, the mind mentally digests facts in three stages. The mastication stage is represented by reading, listening, and discussing. Next comes the churning action during which the thought is attacked by the digestive juices of knowledge, experience, doubt, hope, suspicion, fear, and faith. Finally, the suggestion is either mentally assimulated or rejected. Even though the tongue may give acceptance, if the mind remains unconvinced the idea will be rejected.

Mental digestion may take only a few seconds or it may take days, weeks, and even months, depending on the digestive rate of the individual and the importance of the subject under discussion.

Robert Rawls -- TIME OUT FOR MENTAL DIGESTION. Updegraff Press Limited. Scarsdale, N.Y. (Book may be out of print.)

28

Knowing there's no true acceptance without mental digestion, you should allow time for it. People must ask questions; they must raise objections, no matter how good your ideas may be. To pour facts, figures, and arguments into people's ears is a mistake. Watch the eyes. Study the mental tempo of the individuals with whom you work and particularly that of your boss.

Make it easy for people to mentally digest what you say. Spend enough time in discussion so the boss feels comfortable with your suggestions. Phrases such as "This might be worth considering . . . " or "Perhaps it might be helpful to find out if" are not nearly as charged as: "You haven't thought of . . . " or "You've forgotten . . . " The emotional impact of words can create a bad case of mental indigestion.

One of our greatest mistakes is to expect agreement before a conversation ends or a conference breaks up. Don't be anxious to have the matter settled **now**. The more time people have to think quietly about your suggestions the more likely they are to incorporate them into their own thinking. It's a mistake to force a decision on an important matter. People need time to become accustomed to new ideas or proposals. So the best procedure is to make a suggestion with little or no pressure for an **immediate** decision. As someone once said, if two people always agree, then one is not necessary. But let the disagreement be constructive. Welcome objections and opposition. Avoid being too positive, you are stimulating mental digestion - don't overwhelm it.

Loyalty

You are special and your job is unique because of the knowledge you have of your superior's goals and work habits. This gives you the edge over any other secretary. For you to perform at your top level, you must be well acquainted with your boss's special way of doing things.

Loyalty is an intrinsic part of your job and is expressed in many different ways:

1. You share the boss's problems
2. You respect confidences
3. You anticipate problems before they occur
4. You handle crises with calmness and poise
5. You anticipate needs
6. You plan and keep the top person posted on those things that relate to the smooth operation of the office.

Decisions

Making decisions is one of the challenges in your assignment. The decisions you make help or hinder your boss. You probably make more decisions than most people realize, even the boss. Your decisions involve people, things, and yourself. They are both big and little.

For example, your boss is involved in an important conference. An unexpected call comes. You decide whether to interrupt the conference or handle the call yourself. There's no pat answer; only circumstances can dictate your action.

Decisions involve things such as personally selecting machines and supplies. Or the files, they may require hundreds of decisions. Even when you have centralized filing, research papers, or personal files, all the data must be at your finger tips. Though you may have an assistant who has complete charge of the files, chances are it's your decision to determine the classification of the materials.

Often in correspondence, it's your decision as to whether or not you write all the routine letters. If revisions are needed, are you allowed to revise without consulting the boss? Does your boss want verbatim transcripts? Should you make changes in English?

One young secretary who went to work for her father tried to modernize his letters by eliminating the whiskered phrase, "And I remain,". When her Dad saw the finished manuscript, he yelled, "I remain sincerely yours, is the way I

dictated that letter and that's the way I want it."

Then there was Barbara, who, the first day on the job, typed the signature at the end of the letter. When Mr. Williams came to sign the letters, he scowled and said, "Don't you think I write plain enough so people can read it?"

Being decisive and quick to think, Barbara replied, "Oh yes, Mr. Williams, you write very well, but I thought you would want the typed signature on the carbon copy that goes into the file."

"Um," said Williams, "It's a good idea, have everyone do it that way."

Then there's the decision to hold a letter because of an error even when you know the boss wants the letter to go out on the afternoon mail. It calls for a delicate decision based on circumstances; and the understanding between you and your boss.

When Mr. Jackson, a member of the Board of Trustees, asks for information, what's your decision? Any information you are uncertain about giving out should be handled carefully. Suggest that he ask your supervisor for that information. And if he does not chose to obtain information from your boss, casually mention to your boss that the Board member was interested in this information. In all decisions, your first loyalty is to the boss.

Calls should be screened carefully. Know the purpose of each call so that you can perpare your boss for the visit. And the purpose will also give you some idea of how long the conference should be. If the visit becomes too long have a signal system with Mr. Williams that will allow him to stand and terminate the meeting. For instance, you might call on the phone and say, "Don't forget the agenda for tomorrow's meeting." or "May I see you in five minutes about something that is extremely important?"

Letters, too, should be screened to save time. Letters that can be answered by other people in the department should be routed to their desk for an answer. Of course, if it is an important matter, inform the boss of the message and intended action. You, yourself, can draft replies to routine letters. Local memos and letters can often be answered by phone.

Frequently, it is easier to express an idea if something is written down in black and white. Here you can be helpful. Urge your boss to dictate a rough draft letter. Type it up with 1½ inch margins and double spacing to allow for corrections and additions. As you type the rough draft, think through the communication. It may be helpful for you to comment as follows: "Would the letter read more smoothly if the second paragraph were next to the last paragraph?" or "Do you think the thoughts expressed in this third paragraph

might be clearer if they were two seperate paragraphs?"

One school administrator talked most enthusiastically about his secretary's ability to assist in written communications. The secretary had taken a course in creative writing at night school.

"You have no idea," said this busy man, "how helpful my secretary has been since she completed a course in creative writing. In my written messages to parents, I'll talk to her about the clarity of the communication. If she doesn't understand it, I know the parents won't. Her assistance has been invaluable."

It may suprise you to find out how much time you can save by either making a rough draft of a reply or writing the reply yourself. Attach your draft or written reply to the incoming letter. It can be just the thing that spurs action. The preliminary letter writing saves time even when some of the letters have to be changed because the administrator's decision differs from yours. If you write thank-you letters, letters of congratulations and acknowledgements for your superior, there are no embarrassing moments because a date was forgotten or a friend's promotion was not acknowledged.

Routing systems clear time for priorites. As magazines and other literature comes to the boss's desk, attach a routing slip to each periodical naming those in the department who might be interested readers. Allow two days for each person to read or look over the periodical before passing it to another. Have the readers circle those items or articles that would be of interest to the boss. Annotations can be made on page margins giving the reasons why this particular item is important. Should a reader be absent, move the name to the bottom of the list. The boss's name is last on the list which means everyone has had a chance to read the material. This system of delegating readership keeps periodicals moving. Valuable information is picked up instead of being hoarded on the administrator's desk where no one can see it. You also have a check on those magazines that are helpful. If a magazine consistently draws no comment or few comments, it's probably wise to drop it from the subscription list.

You, yourself, can be a helpful reader and at the same time build your own knowledge by doing some of the annotating. And this is an assignment you may well consider if you are in an office with only one or two people. Both you and your superior are in the role of being transmitters of information; you are constantly on view because of the accuracy of the information. Assuming the responsibility of readership, is an aid in building your reservoir of information.

Establishing priorities

How many times has your boss made appointments without a realistic estimate of the time required or that some higher priority had to be ignored because of poor planning? A calendar system could be a check on this. Keep three calendars. The first is your own working calendar divided into 15 minute or 30 minute time divisions. Here place your activities and appointments plus those of your boss. Also record those things you must follow-up. Any time consuming project that must be done on a given date should be entered with sufficient lead time so it will be finished by the deadline.

The second calendar belongs to the supervisor. This calendar should have pages large enough for you to note the identity of visitors, the purpose of their call as well as their name. All appointments go on this calendar along with non-business events such as family anniversaries and birthdays; if these are omitted the supervisor may have a problem with conflicting appointments. Keep a watchful eye on the supervisor's calendar for those appointments that are made without your knowledge.

The third calendar is a pocket calendar that the supervisor carries around. This is the one that goes to meetings, to luncheons and on trips, or to places where future appointments are likely to be discussed. Keep this memo up to date with desk calendars.

Note the recurring events that must be on calendars year after year. Family dates such as anniversaries, birthdays, school holidays, committee meetings, club affairs, report due dates, faculty meetings, student programs. When a date calls for some special work such as buying a gift, enter this item far enough in advance as a reminder.

Keep a tickler file. This may be a card file with tabbed guides for each month of the year, and each day in the month. Type notes on cards and file the cards behind the proper date or the date that action is needed. Such a file holds pertinent information and prevents too much clutter on the calendars. Appointments go on the calendars; but the additional information goes in the card file. Recurring items may go on one card and the card moved from week to week or month to month.

You may want to try a desk organizer for a tickler file; one with an expanded binder and tabs for each day of the month is good for those who have a small amount of follow-up. However, it limits storage to the current month whereas the card file gives you the advantage of keeping notations for each month in the year.

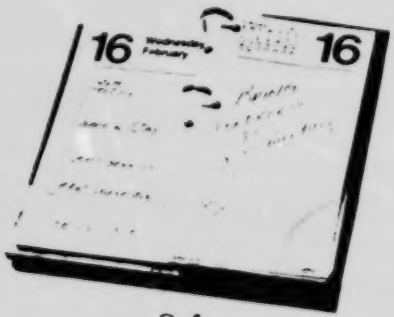
Folders may be used as reminders of unscheduled events and for sorting the mail. Take six folders and head them, **Urgent, Dictate, To Do, Review, File** and **Discard.** Materials not processed immediately are placed in the proper folder. Urgent matters are handled first. Those things of interest and to be read for information go in the **Review Folder**. Once read they may be removed to the **Discard Folder**. The **Discard Folder** holds all materials that may be of some interest and therefore, should not be thrown away at the time of opening the mail. Once the mail is sorted in these categories, personal, general correspondence, bills, circulars, advertisements and periodicals, place it in the proper folder with the **Urgent** or **Action** folder on top.

A file folder system facilitates rapid retrieval of papers and serves as a sorting procedure before filing. It is a convenient grouping of similar items and can be particularly useful when the administrator batches the telephone calls. He has backup material right under his hand.

A mail and phone call digest keeps you on target. Take any 8½" x 11" sheet of paper and head it SUMMARY OF MAIL AND TELEPHONE CALLS. Divide the sheet into six columns with these labels:

Date	Mail Call	Phone	From Whom	Subject	Action

Initiate and handle any follow through the mail demands without being reminded to do so. Learn how to pry papers and projects from other desks so the boss doesn't have to wait too long for them. Tactfully get the papers you need from the boss's desk as well as from other administrators. Check return addresses against your address list for any corrections. Obtain related resource material from the files and attach it to the incoming correspondence. If letters need to be routed to other departments, do this without having to be told. When letters mention an appointment or other deadlines, note them on the calendars you keep.



For the traveling administrator have copies of urgent mail made and sent to him. Number each packet of mail sent so that you will both know they are received. Numbering mail packets is especially important when the boss is on an extended trip and moving from place to place.

Acknowledge all letters received stating a possible date when the sender can expect action. Urge the boss to take a portable dictating unit with him. Give him some self-addressed envelopes with the necessary postage so that he may mail his dictation back to your office. Handling the mail efficiently in the boss's absence frees you both from being inundated under a mountain of mail.

A Memory Book is another tickler file you may wish to consider.This can be a looseleaf notebook set up with pages that contain vital information. Provide a summary page where information is summarized periodically -- at the end of each month, every six months or annually. Keep the book alphabetized and provide space for the boss's notes. Keep this book at a convenient size -- one that is easily handled at or away from the desk. It may even be carried on a trip. Another label for such a book could be FACTS TO BE FOUND QUICKLY.

Did you know how much time these records could save?

Anniversary dates with notes
Each day's appointments
Facts and notes for reports
Filled-out examples of frequently used forms
Hours that visitors appear in the office
Anecdotes and other materials pertinent to the preparation of speeches
Name and business connections of each office caller. (Keep these on 3" x 5" cards in a small file box).
Names of telephone calls your administrator may take at any time
A summary of important transactions completed
A ticker file of reminders to follow up on items expected in the mail on a given date
Summary of unfinished business from the day before placed in the folder containing the records related to that business
A road map or index to the files
A catalog of letters that can be used for routine correspondence
A planned format for business notices issued by the office

Did you know how helpful writing telephone conversations in shorthand could be? Notes can add information in an important case. It's like having money in the bank to have a list of the important facts from a phone call -- particularly the long distance calls. When one point after another comes hurling across the wire, it's much easier to relay the important information if it has been taken down in shorthand.

Did you know that you could measure your worth to the team by the amount of supervision you need? Jot down all the things on which you need supervision that are your responsibility. If the people who supervise you are capable of doing so, why can't you learn to supervise yourself? Each day examine your responsibilities and list those on which you need supervision. As you learn more about your job and office, you can assume more responsibility. Competency requires time and hard work, but eventually comes the day of self-management.

Check your responsibilities. How many do you do without supervision? How many could you do! That's the answer to having a happy boss -- his confidence in your ability to work without supervision.

Section II

LEARN TO COMMUNICATE

1. *The Content of Written Communications*
2. *Listen Attentively*
3. *Write Minutes With A Purpose in Mind.*
4. *General Features of a Good News Story.*
5. *Write Clear, Concise Reports.*

Chapter 1

THE CONTENT OF WRITTEN COMMUNICATIONS

Mary Tramel

"To win friends you must think and write positively."

A Reason For Writing

The first step toward writing an effective message is to have a clear purpose for writing firmly in mind. Be sure that you know exactly why you are writing and what effect you want your communication to have on the reader -- before you even put the salutation on the paper. If you don't know what it is you want your reader to do, it's certain the reader will not know either. Read the following letter and see if you can tell what the writer is suggesting the reader do.

(Mrs. Jones has inquired about her son's progress and has asked for a mid-term report card. She has received the following answer to her inquiry.)

"Dear Mrs. Jones:

"Our policy doesn't allow us to send report cards during semesters, but only at the semester break.

"We understand your interest in your son's progress in school.

Sincerely,"

How would you feel if you were Mrs. Jones? Frustrated, perhaps? Undoubtedly Mrs. Jones would like to have a conference with her child's teacher and/or principal. Probably the principal would say she is welcome, but has that been made clear in the letter? Or does it sound like Mrs. Jones will just have to wait until the end of the next semester?

Fix your purpose firmly in mind and then make every sentence carry the reader closer to the effect you want to accomplish. One of the goals for every letter you write should be to either win or keep the goodwill of the reader. This is possible even when you have to write a letter that says "no" to the reader. (See "Basic Letter Formulas" — page 41)

Don't try to accomplish too much in one letter. You should not have more than one major objective for each letter. If you have two subjects to write about to the same person, it would be better to write two letters, perhaps dated a day apart for easy reference.

In staff bulletins you may need to cover several topics and even make several requests. Visually separate each topic on the page by spacing, by a row of asterisks, or by some other means. Then treat each topic individually as a separate complete message with its own purpose for being.

In a bulletin to parents where you cover more than one topic you may wish to be more creative. You can do this by tying all the topics together with a single theme. Note how the theme, cooperation, runs like a thread through the following bulletin and gives the entire message continuity. Yet each subject is an entity of its own.

"Dear Parents:

"These are busy days for us here at school, just as I am sure they are for you, too. Isn't it great that we have an intangible something we call "Cooperation" to help us through these busy times? We seem to have a plenteous supply of it among our students and their parents. May we use some of it now?

1. First, you probably know that next Monday is a school holiday. This is just a reminder.
2. Some families like to get an early start on a long weekend, especially if a trip is planned. If you do, and if you would like your child released early on Friday, please remember to send a note with him. We cannot release your child early without a note from you.
3. Have you missed any of your child's clothing? There are many unclaimed items in the lost and found. Please have your child check with us for anything you are missing - or come in yourself and look over the lost and found items. You may find something you didn't know was lost.
4. A large number of you will be meeting tonight at 7 o'clock to enjoy another active PTA meeting. We surely do appreciate the cooperation of the PTA. Do plan to come. Every parent is needed.
5. Yes, you've heard this one before! It's Federal Survey time again. The form and instructions are attached. Your cooperation on this means money for your child's education. If you have any question concerning the Federal Survey or the form, please call me.

"Now, cooperation is a two-way street. I hope you will tell me when you need my cooperation in any matter concerning your child's education.

Sincerely,
Principal"

Note that unity of thought was achieved by mentioning the theme, cooperation, in the opening paragraph and again in the closing paragraph, as well as mentioning it or implying it throughout the body of the letter. Continuity was also achieved by numbering the ways in which the parent is being asked to cooperate.

A Good Outline

After you have firmly established in your mind your purpose for writing by answering these three questions:

Who? (Visualize the reader)
What? (Narrow the subject)
Why? (Why write or what do you want your letter to accomplish?)

- then outline your letter. A good way to do this is:

1. List (on paper or in your mind) everything you want to say in your letter. Just a word or two on each point. You will elaborate later when you write the letter.
2. Now, remembering the general construction of a letter (opening, body, closing), place the points you have listed in No. 1 above in the order you are going to write them in the letter.
3. Now you are ready to write the first draft of your letter. As you do remember the 7 C's of good letter writing: clearness, conciseness, concreteness, completeness, courtesy, correctness, and character.

Letter Openings — There are many good ways to open a letter and many bad ones. The main thing is to avoid a stilted, automatic opening – the sort of opening that doesn't say a thing or is worn out because of overuse. The opening is the strongest position in the letter. Here is the place to capture the reader's attention, the place to make him want to read on.

Here are some suggestions on opening:

1. Simply start out.
2. State some action that you have taken. For example: "This morning we telegraphed you . . . "
3. Use a statement of approval, such as: "We are pleased to give you the information you asked for."

Perhaps more important than what to do is what not to do. The following suggestions on what to avoid may appear arbitrary but experience has shown that, in general, it is wise to observe them:

1. Avoid opening with a participle, such as: "Referring to your memorandum of March 5 . . . "
2. Do not begin with a mere acknowledgement: "Your letter of April 19 has been received."
3. Avoid a review of the contents of the previous letter: "In regard to your letter of November 10 in which you state that . . . "

Modern practice is to carry this identifying information in a subject line following the salutation. This is true not only in letters but also in interdepartmental memoranda.

Letter Closing — The close of the letter is almost as important as the opening. Here is another place where you cannot afford to be ineffective, apologetic, or stiffly formal. This is the worst place to bring out your rubber stamp. The closing sentences should be as original and varied as the opening ones. Don't let yourself fall into the habit of adopting automatic closings. Here are a few examples of successful closing techniques:

1. A statement of fact
   "We will mail your application as soon as we receive your request."
2. A question
   "What is your opinion of this plan?"
3. An expression of good will
   "We want to continue to be of assistance to you."
4. A request for action
   "Please fill out the enclosed form and return it by August 15."

You should also note a few precautions on closings. Avoid the following:

1. Closing with a participle
   "Hoping this will be satisfactory . . . "
2. Closing with an anti-climax
   "Do you wish to cancel your appointment with the Superintendent? If you do, inform us accordingly and we will be happy to follow your instructions."
3. Closing with a vague or matter-of-fact statement
   "Thank you for your cooperation in this matter."

The Body of the Letter — The body may be one or more paragraphs, but remember that, generally speaking, a short letter is more effective than a long one. This is true because unless the reader is intensely interested in the message, he will usually skip over a long letter and possibly miss some of the very vital points you wanted to get across.

Appropriate Paragraphing

Each paragraph should deal with only one point or one aspect of the subject of the message. The point of the paragraph should be apparent in the first sentence. There should be a thread of continuity tying all the paragraphs together. One way you can create this continuity is by using connective words such as: therefore, nevertheless, so, also, etc.

Strong Sentence Structure

The sentences that make up your paragraphs determine the degree of clarity and the tone of your message. Someone has said, "It's the little things that count." That's true in writing effectively. The results you get with your letters will depend to a large extent on your choice of words and how you join them into sentences. Here are a few suggestions that will put life and clarity into your messages:

Use Parallel Construction

The reform we seek would lower local property taxes, while at the same time providing our students with more equitable funding for their education programs.	The reform we seek would lower property taxes and, at the same time, provide our students with more equitable funding for their educational programs.

Notice how changing the participle, providing, to a verb, provide, makes the two thoughts in the sentence parallel and increases the clarity of meaning.

Use Positive Construction

Negative	Positive
He was not very often on time.	He usually came late.
He didn't think studying Latin was useful.	He thought studying Latin was useless.

Watch Out for Misplaced Modifiers

"When inflated with air, six people can be carried on a raft."
"The book is about the war that I borrowed."
"Ms. Jones has retired after serving the school district for thirty years to everyone's regret."

Put Action in your Verbs

Passive	Active
Refusal of the proposal by the teachers was a source of annoyance to the Board.	The teachers refused the proposal and the Board was annoyed.

Write Conversationally

The district's health plan has been amended to permit each participating employee an opportunity to share his benefits with members of his family.	Employees who are members of the district's health plan may now include family members as dependents.

Keep Sentences Short on the Average

Average sentence length should be less than twenty words, or about two typewritten lines. Vary the length of sentences. Short sentences are more forceful, but a letter of all short sentences sounds choppy and boring. A letter of all long sentences is hard to read and has little impact on the reader.

Avoid Unnecessary Words

Instead of —	Why not say —
This is to inform you that we have your letter of June 8, 1976, granting me an appointment with you for July 10 at 2 p.m. (26 words)	Thank you for my appointment with you for July 10 at 2 p.m. (13 words)

A long period of time	A long time
The color of the book is blue.	The book is blue.
Neat in appearance	Neat
The general consensus of opinion is . . .	The consensus is . . .

The Right Words

Choose your words carefully. They can affect the tone of your message and the wrong ones can even change its meaning. Here are a few thoughts to keep in mind:

Cliches make for dull reading and do nothing for you. To write fresh, lively, action-getting letters, every word must work for you. If a word does not do something to enhance your letter, it doesn't belong there.

"Replying to your letter of August 7 . . . "

The date is probably not needed at all; and the fact that your letter exists is enough indication that you are replying. So just omit the whole phrase. If you feel it is necessary to refer to the letter received, put that information in a subject line rather than in the letter itself.

Swear words and words or expressions that are not in good taste cheapen your letter and you and offend your reader.

Educational jargon — save it for your professional associates and even then use it sparingly. Education gets a new rash of words every few years. They may help educators in their planning and understanding, but they don't do much for other people. The term "measurable objectives" to an educator is readily understood (or is it?), but few lay people know fully what it means.

Pompous words show off your knowledge but not your education. Difficult, uncommon words fog up what you write. They are a discourtesy to your reader and make him feel ill at ease.

Excessive abbreviations should be avoided. All government offices are drowning in a sea of alphabet soup. Abbreviations such as ESEA, NDEA, VEA, SCRIP, PASCL, ACSA, EDP, PPBS, MDTA, SAC, OSHA, RUPS, PAVE, SEROP, and on and on, are coveniently used in statistical reports, but should not be over-used in correspondence, especially correspondence with the public. If it is necessary to use the initialled abbreviation because of the length of the written out form, be sure to write it out at least once early in the letter, followed by the initials in parentheses.

Red flag words wave a warning to the reader and put him on the defensive. For example, to say you will do something on the following "conditions" rouses a feeling of indignation. (Who does she think she is -- laying down conditions for me!) You might better say, "With the following understanding . . . " "Understanding" sounds more cooperative or two-way than "conditions." Be careful of phraseology that waves a red flag in the face of the reader. For example: "As you were previously informed . . . " and "We are at a loss to understand . . . " mean to the reader, "We think you are stupid."

Red flag words and phrases express your thoughts negatively. To win friends you must think positively. You must expect the best from your readers and let them know you do by the positive, up-lifting tone of your letters. Write as you would like to be written to.

Varied length of words will add spice to your letter. Use both short and long words if they are readily understood.

Explicit words are best. Don't say "thing" if you can name the thing you are writing about. "Item" is just as bad as "thing." For example, "With reference to the item you mentioned in your letter . . . " Instead, say, "With reference to the concern (or the misunderstanding, or the book) you mentioned in your letter."

Precise words can be found with the help of a thesaurus. Some words have generally the same meaning but with different shades of meaning. Here is where a book of synonyms will help you find the word with the precise meaning you need. Consider the connotations of the synonyms you find to discover the one that fits. For example, one teacher was "improvident" in her use of paper; while another teacher was "imprudent" in storing the paper next to the heater.

Confusing pairs are perplexing. Consult your dictionary to be sure you are using the right one. "The administrative **Council** sought the **counsel** of a consultant in behavioral problems." "The Superintendent **disproved** the facts submitted by the teachers association and so the Board **disapproved** the salary increase."

Basic Letter Formulas

Formula 1: "Good News" letters or letters that say "yes"

1. Direct statement indicating purpose of the letter (Tell the good news.)
2. Necessary details (if any) to carry through the purpose of the letter.
3. Good will statement that brings letter to a close.

Formula 2: Persuasive letters

1. Attention-getting statement or device that encourages the reader to continue reading the letter.
2. Statements that present facts.
3. Presentation of request in terms of how it will benefit the reader.
4. Request for action.

Formula 3: "Bad News" letters or letters that say "no"

1. Neutral opening statement upon which both the reader and writer can agree.
2. Reasons for the refusal stated in positive, tactful and courteous tone.
3. Statement of refusal.
4. Suggested alternatives, if any.
5. Statement to retain good will of reader.

Correct Spelling

Be sure your dictionary is updated. We live in an era of such scientific development and discovery that hundreds of new words are coined every year.

Fawcett Crest publishes a **Webster's New School and Office Dictionary** in paperback. It's a good one -- there are others equally as good.

An instant spelling dictionary is also a handy, quick reference to have on your desk.

A **Roget's Pocket Thesaurus** will help you find a word with the exact meaning you want to express. We recommend you have this or some other good book of synonyms handy.

The rules for spelling and the exceptions to the rules are too numerous to include in this text. Keep a good reference book on your desk. The **Reference Manual for Stenographers and Typists** by Gavin and Sabin is an excellent one.

Keep your own spelling dictionary of words that trip you. Writing them yourself in your notebook will help to plant them in your memory and your notebook will become a quick reference for you.

Clear Punctuation

Punctuation rules change just like our language does. A few years back it seemed we were supposed to enclose every phrase in commas. Then the punctuation authorities said, "Don't use commas if you can possibly do without them." Now commas seem to be back in style. A good rule to follow with all punctuation is: If a punctuation mark will make your meaning clearer, then use it. If not, don't clutter your sentences with unnecessary punctuation. In other words, use commas and all punctuation marks with a purpose - not just because they're there!

Accurate Capitalization

There is a growing consensus against heavy use of capitalization. The function of capitalization is to give distinction, importance, and emphasis to words. When too many stand out, none stand out.

Terms like "Board of Education," "Superintendent," "district," may or may not be capitalized depending on the importance the writer assigns to the word in question. Your office may have a preference regarding capitalization. If this is the case, you would do well to follow that style. Basic rules for capitalization are found in your reference manual.

Discreet Hyphenation

Some compound words are written solid, some as separate words, and some are hyphenated. Authorities do not agree on the rules. Moreover, style is continually changing - another reason for having an up-to-date dictionary available.

However, there are some basic rules in your reference manual which you should read carefully and commit to memory.

Whenever possible, avoid dividing a word at the end of a line. Besides being unattractive, word divisions slow down and confuse the reader. If you must divide a word at the end of a line, divide at a point where it will least disrupt the reader's grasp of the word.

Distinguished Styling

There are 7 recognized letter styles. We will not go into them here. They should be listed with samples in your reference manual.

If your district, your school, or your administrator has indicated a style preference, you should, of course, use that style.

Appropriate Addressing

The inside address —

a. Spell out the state name --it looks better that way.
b. It is optional whether you include the zip code on the inside address. However, if you will be writing again to this person, having the zip code on your carbon will save your having to look it up again.

The envelope —

The Optical Character Reader (OCR), now in most large post offices, has some peculiar reading habits. These have caused changes to be made in guides for addressing envelopes. If the new addressing rules are not followed to permit OCR reading, the letter will be rejected and set aside for slower manual sorting.

Jeremiah W. Anybody
P.O. Box 931
Berkeley, CA 94701

Hold for Arrival

AIRMAIL

Solar Heating Company
ATTN: Thomas W. Somebody
59 Third Avenue
Miami, FL 33134

1. All lines of the address should be blocked at the left.
2. All addresses should be single-spaced regardless of the number of lines.
3. The bottom line of the address should contain the names of the city, state, and Zip Code--in that order. Space two or three times between state name and Zip Code.
4. The Zip Code must be used with two-letter state abbreviations.
5. The "attention line" is actually a part of the envelope address and should be typed beneath the company name.
6. Mailing notations, such as "Airmail," "Special Delivery," "Registered," etc., should be typed in all capitals below the stamp position.
7. Addressee notations (Hold for arrival, Please Forward, Confidential, etc.) should be typed three lines below the return address.
8. The address must be surrounded by white (clear) space. This enables the OCR to zero in on the address without obstruction or confusion.

Abbreviations for Use with Zip Codes

Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Colorado	CO	New Mexico	NM
Connecticut	CT	New York	NY
Delaware	DE	North Carolina	NC
District of Columbia	DC	North Dakota	ND
Florida	FL	Ohio	OH
Georgia	GA	Oklahoma	OK
Hawaii	HI	Oregon	OR
Idaho	ID	Pennsylvania	PA
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virginia	VA
Massachusetts	MA	Washington	WA
Michigan	MI	West Virginia	WV
Minnesota	MN	Wisconsin	WI
Mississippi	MS	Wyoming	WY
Missouri	MO		

Canal Zone	CZ
Guam	GU
Puerto Rico	PR
Virgin Islands	VI

CANADIAN PROVINCES

Alberta	AB
British Columbia	BC
Labrador	LB
Manitoba	MB
New Brunswick	NB
Newfoundland	NF
Northwest Territories	NT
Nova Scotia	NS
Ontario	ON
Prince Edward Island	PE
Quebec	PQ
Saskatchewan	SK
Yukon Territory	YT

Models for addressing officials of government, church and armed services are included in your reference manual.

30

Proper Fit (Abbreviations)

1. Use abbreviations and contractions sparingly.
2. Be consistent within the same letter, report, etc. Do not abbreviate a term in some sentences and spell it out in others.
3. Use only generally accepted abbreviated forms. Some abbreviations have alternative forms. Again, be consistent. Select one and stay with it.
4. Refer to your reference manual for rules for abbreviating.
5. If you use the initials of a board, commission, or organization (such as, ASCAP for American Society of Composers, Authors, and Publishers), spell the name out the first time you use it in a communication. Your reader should not have to guess what the letters stand for.
6. Again, use abbreviations sparingly. Not everyone likes alphabet soup.

Correction of Defects

Learn proofreaders marks and use them when proofing copy, especially copy that will be re-typed by some one else. If both you and the typist understand proofreader's marks, there will be no misunderstanding of your desired changes.

Speaking of proofing, NEVER allow anything to leave your office without being proofed. Here are some hints on how to catch errors:

1. Proof once **before** removing the page from the typewriter. It's much easier to make corrections then.
2. Proof again, carefully, before submitting to administrator for signature or before mailing.
3. If possible, have some one else proof your typing for you. It's hard to see your own typing errors.
4. Read slowly or read lines backwards to force yourself to look at each word.

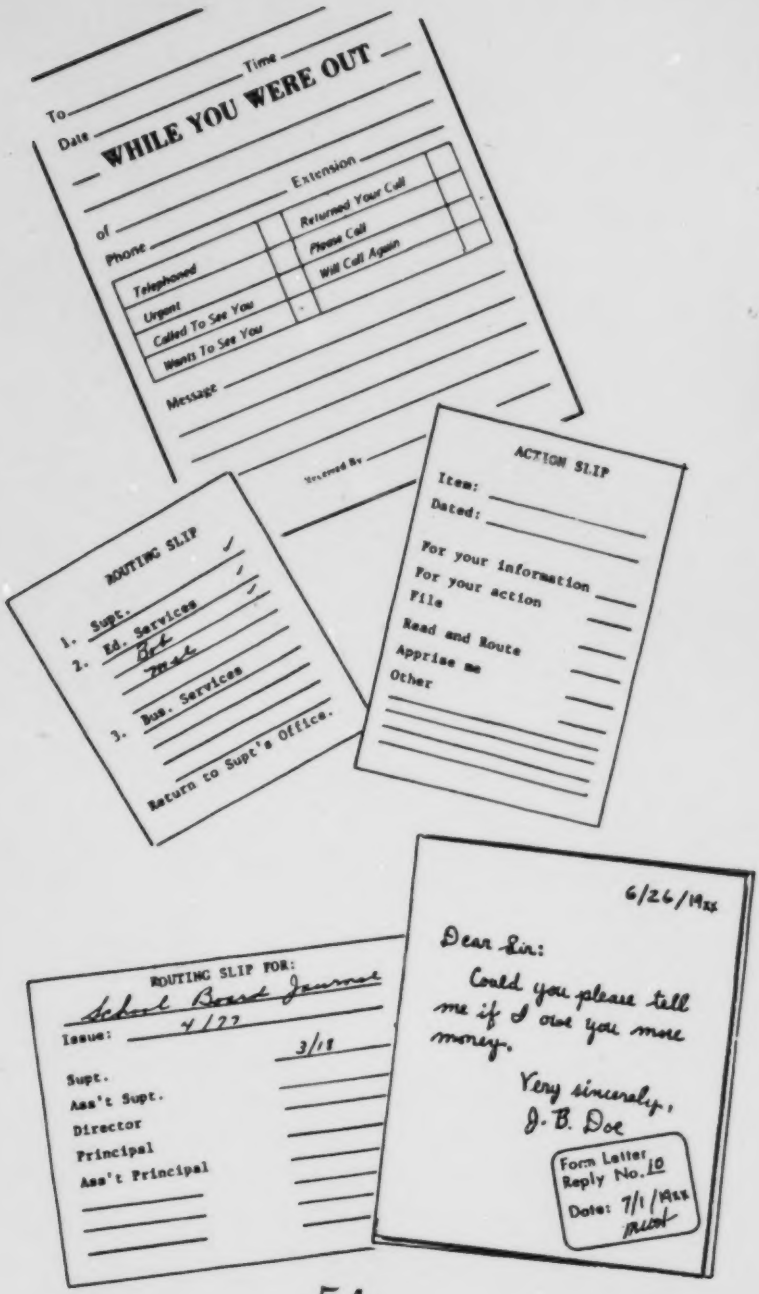
Proofreaders' Symbols

▬	Under letter or word means caps.
═	Under letter or word, small caps.
—	Under letter or word means Italic.
~~	Under letter or word, bold face.
⸗/	Insert comma.
;/	Insert semicolon.
:/	Insert colon.
⊙	Insert period.
/?/	Insert question mark.
(!)	Insert exclamation mark.
/=/	Insert hyphen.
✓	Insert apostrophe.
✓✓	Insert quotation marks.
✓	Insert superior letter or figure.
⁁	Insert inferior letter or figure.
[/]	Insert brackets.
(/)	Insert parenthesis.
wf	Wrong font; change to proper font.
Qu?	Is this right?
l c	Put in lower case (small letters).
sc	Put in small capitals.
Caps	Put in capitals.
C+sc	Put in caps and small caps.
rom	Change to Roman.
ital	Change to Italic.
∧	Make correction indicated in margin.
stet	Retain crossed-out word or letter; let it stand.
....	Retain words under which dots appear; write "Stet" in margin.
stet	
✕	Appears battered; examine.
▬	Straighten lines.
✓✓✓	Unevenly spaced; correct spacing.
//	Line up; l.c., make lines even with other matter.
run in	Make no break in the reading; no ¶.
no ¶	No paragraph; sometimes written "run in."
see copy	Here is an omission; see copy.
¶	Make a paragraph here.
tr	Transpose words or letters as indicated.
⸗	Take out matter indicated; dele.
⸗	Take out character indicated and close up.
⊄	Line drawn through a cap means lower case.
⅁	Upside down; reverse.
⁀	Close up; no space.
#	Insert a space here.
⊥	Push down this space.
⌂	Indent line one em.
[	Move this to the left.
]	Move this to the right.
⌐	Raise to proper position.
⌊	Lower to proper position.
///	Hair space letters.
m	One-em dash.
m	Two-em parallel dash.

CONSERVATION AND IMPROVEMENT OF WRITTEN COMMUNICATION

Here are twenty suggestions you can make to your administrator on how to reduce the cost and improve the quality of letter writing.

1. Provide inservice training for all clerical employees in the production of letters.
2. Provide training and instruction for those who give dictation.
3. Equip secretaries and stenographers with electric typewriters, top quality dictating machines, and secretarial reference materials.
4. Determine letter style (on the basis of appearance and efficiency) and make sample available to all schools and departments.
5. Use the telephone to convey short messages and when a written record is not necessary.
6. Consider the use of word-processing equipment.
7. Use more handwritten notes for interoffice communication.
8. Set up a file of guide letters and/or guide paragraphs for repetitive correspondence.
9. Employ secretaries with high level shorthand and typewriting skills.
10. Develop printed materials (leaflets, insert sheets, brochures) to be used in place of longer letters.
11. Increase the use of dictating machines.
12. Delegate responsibility for routine letter writing to secretaries and assistants.
13. Analyze cost of preparing duplicate copies. Are more being made than necessary? Would it be cheaper to Xerox than to handle multiple carbons?
14. Analyze the layout of secretarial work stations and trace the flow of correspondence production.
15. Analyze the frequency of reference to previous correspondence. Is correspondence giving accurate and complete information the first time?
16. Eliminate airmail postage except when absolutely necessary. Most first class mail goes by air anyway.
17. Use high speed metering devises.
18. Use pre-printed routing slips and action notes.


To
Time
Date
WHILE YOU WERE OUT
of
Extension
Phone
Telephoned
Urgent
Called To See You
Wants To See You
Returned Your Call
Please Call
Will Call Again
Message
Received By
ROUTING SLIP
1. Supt.
2. Ed. Services
Dpt
Mail
3. Bus. Services
Return to Supt's Office.
ACTION SLIP
Item:
Dated:
For your information
For your action
File
Read and Route
Apprise me
Other
ROUTING SLIP FOR:
School Board Journal
Issue: 4/77
3/18
Supt.
Ass't Supt.
Director
Principal
Ass't Principal
6/26/19xx
Dear Sir:
Could you please tell me if I owe you more money.
Very sincerely,
J. B. Doe
Form Letter
Reply No. 10
Date: 7/1/19xx

19. Establish a working agreement with your secretary on how to handle incoming mail. Which letters should the secretary compile for your signature? Which letters should be routed to another administrator for handling? Do you want your secretary to mark the important points in letters for your attention, so you can scan and not have to read the whole letter? Do you want your secretary to attach all pertinent information you will need to answer a letter?
20. Establish with your secretary a good follow-up procedure to assure no letter goes unanswered that should be answered.

Chapter 2

LISTEN ATTENTIVELY

Virginia Mathony

"Take time to listen and you will discover many things."

Before printing was invented, people depended upon listening skills -- an important part of communication. This was one way to learn. Early scholars spent hours listening to their teachers. The mind absorbed, retained, and then, as needed, related by word of mouth what it had placed in its memory bank. Listening might be considered an important training tool for memory. People listened to learn. And their desire to learn, along with their ability to remember, was to some extent a determinant for their degree of intelligence.

The skill of listening decreased with the invention of the printing press. As people learned to read they spent more time reading and less time listening. They were informed through the printed word.

The invention of radio made people once again aware of the need to listen sharply; words missed were gone for good. Consequently, listening skills were developed and, in turn, so were imaginations. When television came into the homes, both listening and visual skills were needed and very little was left to the imagination. Listening and seeing depended upon one another for good understanding.

Think back through the ages about these changes. As progress was made, human senses adjusted to fit the technology of the day; one skill was sometimes more important than another.

Training was available in reading, writing, and speaking through the years, but no help was given in how to develop listening skills. From the time a new-born baby was aware of sound, individuals controlled their own listening ability. It was taken for granted that every one knew how to listen; but the degree of listening skill was not given much consideration. Now classes are offered in which listening is stressed and where listening skills may be sharpened through training and practice.

Studies show that in communicating people spend at least 45 percent of their time listening.[1] Another survey reports that executives spend 80 percent of their office time

1. Paul Rankin's study completed at Ohio State University.

in talking: at meetings, dictating, telephoning, issuing instructions, and other ways. In order for their directions to be carried out, someone must listen and that someone could very well be you, a member of the office staff.

At a recent conference, a college professor told his audience that people over 25 years of age read and those under 25 years of age do not read. When he began teaching about eight years ago, this professor of history spent much time preparing papers on local history for his students but found them unwilling to read these papers. Why? Much of their early training was in front of a television set; their visual and aural senses were developed to the point where reading seemed impractical to them. They learned more easily and in less time when lessons were visible with sound.

Video taping made its appearance in the 1960's and has recently become quite popular in colleges. This same professor now video tapes local history for his students. Other students become involved in the production of tapes and a new skill is made available. Have people progressed to another new technology where reading is no longer as important as it was following the invention of the printing press and before television? Is reading left to those over 25 years of age who find enjoyment in reading? And are those under 25 years of age denied this pleasure because they feel a need for rapid learning?

There is a solution; one that is popular today and it involves another skill: speed reading. It is still necessary for students to read textbooks; for people to read newspapers and magazines for details not available on radio and television; and to read for enjoyment. Since time seems to be the important thing today -- so many things to learn -- many adults and young students are turning to lessons in rapid reading and find them most beneficial.

All skills are needed by office personnel

As office personnel in education, you know that all of these skills: reading, listening, seeing, and hearing are necessary. You use combinations of each skill daily with, perhaps, listening being one of the most important. You are more help to your boss when your listening skills are sharp.

In an office you cannot tune out sounds and voices to satisfy your own convenience. Sometimes it may be necessary to close out sounds in order to accomplish an important matter at hand; it is called concentration. Another

time it might be called lazy listening, day dreaming, or intentionally closing out something undesirable. As it becomes easier to shut out noise, it becomes more difficult to listen attentively. Do you always hear what your boss says when you are busy working? Perhaps you hear, but not well enough to retain what was said or even understand it fully. As with the scholars of old, listening must involve hearing, understanding, and interpreting in order to recall what was said and apply it when it is needed at a later time. Listening doesn't stay in second place very long. It has come to the front often enough for people to realize its importance. Perhaps now is the time to consider some training in the art of listening since it has a high priority in all offices.

The importance of listening

How often do you wonder if someone has "tuned you in" or "turned you off?" Sometimes mannerisms give them away. Although listening skill is one of the most important qualifications for success in an office, according to Ralph G. Nichols, it appears to be one of the most inefficient tasks performed by office workers. [2] This foremost authority on communication -- after years of research concluded that an average white-collar worker demonstrates only about 25 percent listening efficiency. Perhaps this is because not enough attention has been given to the subject of listening; perhaps it is because the mind works faster than a person can talk. A busy mind can go off on little side trips and come back without missing too many words and much of the context. At a lecture there is time to think about what is being said; time to evaluate the speaker's words; relate them to your own experiences; and draw some conclusions of your own. But when you stay away too long, both words and meaning are lost. Listening requires concentration which is developed through self-training. No one can tell you when to listen and when to stray.

Listening makes an experience more enjoyable. For example, at a theater you can enjoy the costumes, scenery, dancing, and acting but you get full enjoyment of the entire performance if you listen attentively to all the lines as well. Since almost half of your day is spent in listening, it is important to listen attentively and to do this, self-training is necessary. Many worthwhile things in life depend on self-

2. Nichols, Ralph G. "Listening is a 10-Part Skill." Readings in Interpersonal and Organizational Communication, Second Edition, Boston: Holbrook Press, 1973, p. 574.

discipline and self-training; things that no one can do for you.

If you have forgotten how to listen effectively, you will need to discover the reason. There may be some barriers in your way. As soon as you identify what keeps you from listening, you can begin your self-training. Classes are offered in colleges and adult schools that share the various steps needed to overcome these barriers and help people become better listeners.

The importance of attitudes

There are several attitudes that create barriers to effective listening. Indifference is one of them. Are you indifferent to a speaker or a co-worker? Do you tell yourself you already know what the speaker is going to say, or you don't care what the subject is? So you listen half-heartedly while your mind speeds on about other things. During an introduction, do you sometimes immediately forget the name of the person? Embarrassing, isn't it? Often courtesy is put aside because someone's mind is too busy to listen.

Preoccupation is another common barrier, especially in a busy office, but it is one you can learn to overcome with a little practice. Do you always hear what is said to you when you are concentrating to meet a deadline? One ear should always be cocked to pick up the signal of someone's voice. The signal says: "Stop working and listen!" If you are the only person in the office, preoccupation can be a detriment. There are occasions when you can't afford interruptions; when this is the case, ask someone from another office to come in an do your listening for you so that the routine of the office is not disrupted.

Have you had the experience of having Mrs. Principal leave the office several times within a short period of time? When someone comes in and asks for her, can you always recall where she went the last time? Jot down where she is going each time she leaves the office and then line it out when she returns. What she tells you will penetrate more deeply if you stop your work long enough to make a note and you will have a point of reference when that long distance telephone call breaks the silence.

The door of your mind constantly opens and closes to keep you aware of what is taking place around you while you work. But you must be in control of this opening and closing so that the door will open far enough for you to listen to what you should hear. Again, it is not easy, but

becomes easier with practice.

Noise and confusion are barriers to listening. The type of office in which you work will determine the amount of noise and confusion that is allowed. You should set the tone of the office to encourage favorable listening and working conditions. Noise and other distractions interfere with incoming telephone calls and performing office duties. Don't drown out the sounds and voices you should hear.

Your boss depends upon your listening ability for the smooth operation of the office. Do you sometimes become so involved with work you like doing that you consider visitors, the telephone, or even your boss asking you to do something else an interruption? It is well to remember that many of the things you might identify as interruptions are really part of your job. You are there to take care of these many "interruptions" and must take care of them in order to free your boss for more important work. Don't ever feel that they are not important. If they didn't exist, there might not be need for you. Learn to listen for ways to support your boss.

What about prejudice? Do you dislike a speaker for some reason? Is it because of the way Jane dresses, or the way Jim speaks? Maybe you've already met and your first impression was not good. Give them another chance! Try to rise above the prejudices that will keep you from listening attentively. Try to see beyond appearances to the real person. You may hear the greatest message that you have ever heard from someone with a wrinkled collar. If you concentrate on the words and not the collar, you will get the message.

Summary

The rewards of listening, understanding, and retaining what you hear are many. You can interpret what you hear to meet your own needs and this knowledge can be evaluated and later shared with others. Your attitude often makes the difference. Attitudes can bring you high rewards or can prevent you from learning. What your attitudes do for you is up to you. If you have forgotten how to listen attentively, you will first need to discover the reason before you can begin your self-training. There may be more than one barrier in the way; begin now to identify them and break them down and open the way to better listening and better understanding.

Chapter 3

WRITE MINUTES WITH A PURPOSE IN MIND

Catherine Sullivan

"Obtaining knowledge beforehand simplifies the taking of minutes."

MINUTES - WHAT ARE THEY?

Over a period of time minutes become an historical record reflecting the business of the group. Minutes always include all official actions taken by the group; and may or may not include discussion depending on the preference of the group and the nature of the item being considered.

MINUTES - WHY ARE THEY?

Minutes provide an easy reference to action taken by a group and are kept by different methods.

1. The governing board of an educational institution might want a word-for-word report of what was said at a meeting.
2. At another meeting, there might be a need for only a record of decisions made on questions, exclusive of discussions.

Whatever the method, the policies under which the group functions determines the kinds of minutes recorded for any meeting. Whatever type of minutes the occasion demands, it is essential to keep them.

Some minutes have the status of official legal documents; some are published for public scrutiny. Treat every set of minutes as though it will some day appear in court. It is surprising how often this actually occurs.

This chapter was based on material in **Take A Minute, Save an Hour**, a NAES publication now out of print.

MINUTES - WHO DOES THEM?

School Board, Faculty, Committee, and others

There is no need to remind you of the importance of school meetings for holding discussions, planning projects, board sessions, senate meetings, faculty meetings, and carrying through on programs of concern to the school, university, and the community. But perhaps you need to be reminded of the importance of your own role in meetings, and following through to implement the decisions made at these meetings. The greater the degree of skill with which you carry out your responsibilities, the more successful the meeting will be.

In board of education and school staff meetings, for example, a secretary may be appointed or may be the secretary to the superintendent or president. At the meetings of most boards of education the secretary to the superintendent records the minutes. However, in some instances, a school board member is elected or appointed as secretary to the board. As with the recording of the minutes, the appointment or election of the secretary is according to the policies of the group.

When a committee member or board member takes the minutes of a meeting, you, the secretary in the office, are often responsible for typing them in final form. The minutes may be dictated to you or given to you in rough form. In order to do this typing job well, you must have on hand the correspondence read at the meeting; the reports, resolutions, and documents acted upon; and the exact text of the motions acted upon.

After you type the minutes in rough draft -- double spaced and in third person -- submit them for correction and editing to the person who gave them to you. In some cases, they may be sent to a minutes approval committee. When possible, a person who was quoted should read the quote as recorded and approve or change it before the final draft is typed.

It may be that you are responsible for the publicity in advertising a school board meeting and in disseminating information following the meeting. The chapter on preparing news releases will help you in your contact with the news media.

Since board minutes are official legal documents it is essential that they show the following:

1. When and where the meeting was held;
2. Who was present; who was absent;

3. What was considered;
4. What action was taken and, if a roll call vote was taken how each member voted;
5. Any pertinent comments that were made on board action (though extended discussion and debate are not recorded).

If you can foresee a time when someone will need to know how the group arrived at a particular decision, include enough of the discussion to explain this. Board meetings deal with many routine items that would need no comment or discussion recorded.

Organization Meetings

In organizations or associations, the secretary is elected by the members and it is the duty of this person to accurately keep an accounting of all meetings.

The secretary of an organization usually works independently of a committee, but may delegate various duties to selected deputies. The secretary should prepare a month-by-month calendar of the duties from which to work.

If the president, president elect and vice president (or those elected to succeed to the presidency) are not present at a meeting, it is the duty of the secretary to call the meeting to order when the hour arrives and to preside until a chairman pro tempore is elected. This election should take place immediately. The secretary's duties, in general are to:

1. Determine if a quorum is present;
2. Take the minutes at each meeting, following the procedures established by the group;
3. Take roll call unless the president or chairman asks for a voice vote or consensus on routine matters;
4. Make certain to record motions made and by whom;
5. Type and send a rough draft of minutes to the minutes approval committee within the time frame established by the group;
6. Make a final copy of the minutes to be approved by the group at the next meeting;
7. Disseminate the minutes according to group policies;
8. Place the corrected original copy in the permanent minutes book;
9. Sign the minutes and secure signatures of the presi-

dent and the chairman of the minutes approval committee;

10. Maintain a minutes book (a permanent pegged loose-leaf book which may be purchased commercially). The permanent minutes should be sealed and stored.

Included in the permanent minutes book should be:

a. Copy of bylaws and other governance documents
b. Code of Ethics
c. All resolutions

The secretary's role, to accurately record the proceedings of the group, is an important one. The secretary's performance is up to standard when the duties and responsibilities are fulfilled as required.

MINUTES - HOW DO YOU DO THEM?

Agendas

You need to plan ahead in preparing for taking minutes, and the first step is to prepare an agenda.

Prior to the meeting, you may be asked to meet with the administrator or chairman to help plan an agenda. Although you may have a small part in the planning, you will have a very important part in preparing the written agenda, so you should be familiar with the order of business.

In a rack on your desk, or in a file drawer, keep folders marked with the names of groups for which you have prepared agendas and taken minutes. When members of these groups bring items of business to be considered at their next meeting, place the information in the proper folder. When it comes time to prepare the agenda, use the material in the folders along with information suggested by your boss, or the meeting chairman.

Board agendas are handled somewhat differently. Deadlines should be set for agenda items and they must be submitted far enough in advance so you can prepare the agenda and deliver it to the board members in advance of the meeting. This procedure allows ample time to study the items and reports that will be brought to the meeting for discussion, consideration, and action.

The items of business to be considered will vary from meeting to meeting, and the order of business is often set

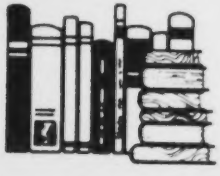
forth in the policies or bylaws of the group. However, for many meetings, the following is suggested:

1. Call to Order
2. Pledge of Allegiance or Invocation
3. Roll Call
4. Approval of Minutes of Previous Meeting
5. Reports of Officers (copies usually provided)
6. Reports of Committees (copies usually provided)
7. Unfinished Business
8. New Business
9. Date and Place of Next Meeting (unless established in bylaws).
10. Adjournment

Codes for Agenda Headings

Any system you devise for coding which is clear and easy to follow can be used as long as the superintendent or chairman or the governing body agrees. If you are taking minutes for a group for the first time, it would be wise to follow the format already established unless you are directed to do otherwise. If you think you have a better method, discuss it with the proper person.

When you type the minutes, code them according to the main headings of the agenda. (See the sample Outline for Agenda.) Provide a number for each of the main headings such as those in the sample Code for Agenda Headings. When you write the next set of minutes, continue the serial coding by numbering the action on the new set. In coding, if a motion is lost, it should be indicated by inserting in parentheses the capital letter "L" before the number of the motion: (L) 1.13.



1. OUTLINE FOR AGENDA

1. Any item not on the agenda may be brought to the board's attention at this time. The board then decides whether or not to recognize the item or defer it to the next meeting. Any visiting delegation or agenda emergencies are presented at this time.

2. General functions
   Matters of general concern to the board affecting the school district: policies, district procedures and business, school calendar, salaries, and resolutions

3. Personnel
   Business affecting employees covered by district policies: employment and termination, including part-time employees and position transfers

4. Curriculum and instruction
   Items pertaining to district curriculum, such as courses of study, including summer-school items

5. Financial and business procedures
   Approval and ratification of purchase orders, financial reports, bid summaries, and awards

6. Buildings and grounds
   Building inspector's progress reports and maintenance problems

7. Pupil personnel
   Reports on district permits, late entries, suspensions and expulsions, and accident reports

8. Public relations
   Matters concerning community-school relations

9. Auxiliary services
   Other services rendered by the district, such as recreation

Preparation

As you prepare to record a meeting, check carefully to see that you have the necessary working tools and materials:

Several pens or pencils

Plenty of paper

An accurate time piece

Motion cards

An agenda (two could be used to advantage; one for marking of pertinent data)

Copies of reports

Copies of all governance documents

A tape recorder would be an aid; (however, notes should also be taken. It is better to have too many notes than too few)

Minutes of the previous meeting

A book on parliamentary authority approved by the group

Obtaining knowledge beforehand simplifies the taking of minutes. Ascertain the purpose of the meeting, and if possible, read copies of resolutions, reports, and other items prior to the meeting so you understand thoroughly all of the items on the agenda. Obtain a list of the persons to be present at a small meeting where there is to be a roll call, and at the meeting simply check the names on the list as "P" or "A" (present or absent).

If you take notes at several different types of meetings (school board, association, faculty, and others) prepare a check list of the items you need for each meeting. Before the meeting, consult your list to be certain you have the items you will need.

Procedure for Recording Minutes

A recording secretary must concentrate completely on taking minutes. You should sit near the chairman or in a position to hear every word. If unable to hear, signal the chairman who can interrupt and ask the speaker to repeat what was said.

Note late arrivals and early departures because an important point may hinge on whether or not a certain person heard a certain discussion. Just list the time of the late arrival or early departure beside the person's name.

2. CODE FOR AGENDA HEADINGS

0. Code number for all minutes
   0.1 (Coding begins on July 1 of each fiscal year)
1. Code number for all items of business under the main agenda heading, QUESTIONS FROM FLOOR
   1.2
   1.3
   1.4
2. Code number for all motions under GENERAL FUNCTIONS
   2.5
   2.6
3. Code number for all motions under PERSONNEL
   3.7
   3.8
4. Code number for all motions under CURRICULUM AND INSTRUCTION
   4.9
5. Code number for all motions under FINANCIAL AND BUSINESS PROCEDURES
   5.10
   5.11
6. Code number for all motions under BUILDING AND GROUNDS
7. Code number for all motions under PUPIL PERSONNEL
8. Code number for all motions under PUBLIC RELATIONS
9. Code number for all motions under AUXILIARY SERVICES

Following the meeting, obtain copies immediately of all papers read or discussed at the meeting and transcribe your notes as soon as possible. Be certain to have copies of all motions signed by both the maker and the seconder.

Always make a rough draft from your notes--the sooner the better--since details are clearer immediately following a meeting. Copies of the rough draft should be sent to the minutes approval committee for corrections or amendments, within the time frame established by the group. In the case of a school board meeting, your rough draft will probably be checked by the chairman of the meeting or the superintendent.

Following receipt of corrections or amendments, the final draft should be prepared for presentation to the group for approval at the next meeting. Corrections to the final draft of the minutes should be written in red ink or attached on a separate page. No minutes should ever be rewritten or changed in any way after they have been approved and presented to the association or school board members.

Attachments to the minutes need not be written into the minutes unless they are very short. A notation may be made in the minutes stating that the papers are to be incorporated therein and state where they are located.

An index of the more important subjects discussed may be kept in the back of the minutes book or on separate cards. See samples No. 4 and No. 5. In some instances you may want to prepare a summary of action items for the officers of the board which they will keep in looseleaf notebooks for easy reference.

Contents of Minutes

The contents of minutes vary with the needs of the group. The bylaws of some organizations indicate the order of business to be followed. The data usually recorded is:

Title, capitalized and centered
Date and hour and place
Call to Order
Roll Call
Quorum
Reading of minutes of previous meeting and approval of same
Reports (a brief summary)

Action items: Motions, consensus decisions, appeals, points of order, resolutions
Results of elections
Adjournment and hour
Next meeting: date, time, and place

Minutes are seldom copied verbatim, with the exception of resolutions and motions which are recorded exactly as given. However, if there are controversial issues dialogue would need to be referenced and would call for a word-for-word detailed report. Record the dialogue exactly as stated -- never interpret it. When your record debate, give both sides of the issue. When written copies of speeches are included, record them in full, if possible. Record all motions, points of order and appeals, and resolutions. Never make personal comments in minutes, favorable or otherwise, on anything said or done.

3. Sample Motion Card

Motion Number _____

Date _____

Motion by _____ Seconded by _____

I move that: _____

_____

_____

Motion Carried _____ Motion failed _____

Roll Call Vote _____ Voice Vote _____

Amendments

Record amendments on a blank page opposite the article ammended with a reference in red ink to the date and page of the minutes where it is recorded. Keep copies of all reports given at the meeting among the records of that meeting.

Motions withdrawn

Motions withdrawn do not have to be entered into the minutes, but they may be for reference.

Arrangement of Minutes

Arrange your minutes so that important matters such as motions, resolutions, votes (how taken), and decisions are easily discernable. Sideheads or paragraph heads may be used to advantage, or important words may be underlined. For easier reference, number items and sideheads on the right-hand side of the page.

Final Preparation of Minutes

In the final preparation of minutes, take particular care with details in typing, arranging, and spacing. The following format is suggested:

1. Begin each set of minutes on a new page of a looseleaf permanent record book.
2. Capitalize and center the name of the group allowing an inch or two for a margin at the top.
3. Enter the date of the meeting -- double spaced -- under the heading.
4. Type the minutes, single spaced, on durable white paper, using wide margins.
5. Enter pages in the permanent minutes book and number the pages consecutively for a year.
6. Number each item of business for each fiscal year consecutively. Enter the number of the motion at the left or right of the first line that records the motion or below the topical heading.
7. Indent resolutions about 15 spaces and single space them.
8. In the resolutions, capitalize all letters in the words WHEREAS and RESOLVED, following them with a comma. Begin the word THAT with a capital letter.
9. Provide space for signatures and approval date at the end of the minutes.

When you have typed the minutes in final form, gather all documents that have been made a part of the minutes by board action and place them in the minutes book with the minutes. It is wise to save rough draft notes in case any question should arise. Have the looseleaf minutes book bound at the end of the fiscal year. These bound books are kept permanently or until they have been microfilmed.

Minutes File

If the minutes are voluminous, keep a card index or rotary index so that any business which has been passed upon may be referred to easily and quickly. Marginal captions in the minutes facilitate compilation of the index. Information on the index cards includes the subject of the caption and the page on which it appears.

If you use the FILE IT RIGHT AND FIND IT system of filing in your office, you may find it easier to use those established classifications and numbers for coding your minutes. Following are samples of a Minutes Book Index and Card Index using FILE IT RIGHT classifications and numbers.

4. Sample Card Index using FILE IT RIGHT classifications

2 -- ADMINISTRATION	Date	Page
Board	_____	_____

5. Sample of a Cross Index File Card

TEACHER EMPLOYMENT	Date	Page
Employment approved	____ 19 ___.	46
	____ 19 ___.	58
	____ 19 ___.	103

Sample of Minutes Book Index

NAME OF BOARD OR ASSOCIATION

Minutes Book Index

Date

	Date	Page
2 ADMINISTRATION		
Annual Reports	____	____
Action _____		
_____		
Board, General	____	____
Action _____		
_____		
3 ASSOCIATIONS & ORGANIZATIONS		
Institutional Memberships	____	____
Action _____		
_____		
9 BUSINESS AFFAIRS		
Budget	____	____
Action _____		
_____		
Contracts	____	____
Action _____		
_____		
29 SUMMER SESSION		
Course Offerings	____	____
Action _____		
_____		

Distribution of Minutes

Minutes in the final form are usually distributed as follows unless you receive special instructions from the president or chairman of the group.

Administrative Board — to all members of the Board
to administrators in the system
Associations — to all officers of the Board
to all committee chairmen who meet with the Board
Faculty meetings — to all members of the faculty

A complete Cycle

When you have reached this point you have completed a cycle of work. If minute taking is a major part of your job, perhaps it is time to prepare the agenda for another meeting.

Your life is literally made up of minutes -- those associated with days, weeks, and years and those associated with meetings. So remember, a minute properly taken will save many hours of work later.

GUIDELINES FOR MINUTES APPROVAL COMMITTEE

The minutes approval committee is appointed by the president or chairman prior to the meeting. Each member has a responsibility to take notes throughout the meeting so that when the rough draft from the secretary arrives, there will be facts to check against.

The following is a check list for those appointed to this important committee.

1. Check the list of those present, time of call to order, and report of the quorum. Note when voting members enter or leave the room following the call to order. If someone is out of the room during a motion, the committee member should note that (name) was out of the room and did not vote.

2. Record all action items only, unless the meeting is one that requires more detailed information.

3. Include surnames as well as first names at all times. No nicknames should be used since minutes are a matter of official record.

4. Do not include criticism or personal opinions in the minutes.

5. Use past tense or past perfect tense whenever possible.

6. Refrain insofar as possible from changing the wording of the secretary when you receive the rough draft. Sometimes it is a temptation to rewrite something in your own words.

7. Do not alter motions in any way except for grammatical corrections that do not change the content.

8. Return the edited minutes to the secretary within a two-week period for final draft.

Sample Format for Minutes

Name of group for whom minutes are taken (in capital letters)
Place of Meeting
Date (month, day, year)
Kind of meeting (Business meeting, Board meeting, Committee meeting)

1. The meeting of the ..... was called to order by President (or Chairman) (complete name) at (place, date) (month, year & day), (hour a.m./p.m.). — **CALL TO ORDER**
2. The following voting members were present for roll call: (List in alphabetical order) — **ROLL CALL**
   Absent: (List in alphabetical order)
   A quorum was established. — **QUORUM**
   Others present: (List other than voting members in alphabetical order)
3. The minutes of the (give meeting date) have been approved as presented (or as corrected or amended). — **APPROVAL OF MINUTES**
4. Reports (give a brief summary of each report or make a notation that the report is attached). — **MEMBERSHIP COMMITTEE REPORT**
   (List each report and give a brief summary of each) — **SCHOLARSHIP COMMITTEE REPORT**
   (If the committee report is listed by number on the agenda, the report in the minutes should follow the same numbering system.)
5. Unfinished Business (only action items need to be recorded).
   List the motion exactly as given, naming maker. (The name of the person seconding the motion is not necessary but some organizations prefer that the name be recorded.) — **MOTION SCHOLARSHIP**
6. New Business (only action items need to be recorded). (Follow the same procedure as for unfinished business.) — **MOTION PUBLIC RELATIONS COMMITTEE**
7. Elections (Record the results of the election and how the vote was taken.) — **ELECTION OF NOMINATING COMMITTEE CHAIRMAN**

8. Adjournment (state time a.m. or p.m.)
(The meeting could be adjourned by the president with no objections from the group or by a motion that the meeting adjourn, with the proper second and vote.)

ADJOURNMENT

9. (If a time and place for the next meeting is decided upon, it should be listed here.)

NEXT MEETING

Respectfully submitted,

Signed _____
Secretary

Signed _____
President/Chairman

Approved _____
(date & initial of secretary)

Approved as amended or corrected

_____
(date and initial)

77

Chapter 4

GENERAL FEATURES OF A GOOD NEWS STORY

Mary Tramel

"News of coming events has the edge over post mortems on yesterday's happenings."

The Five Ws

News writing is different from fiction writing. In a magazine story lesser events build up to a climax. The news story tells you the climax occurred and then tells you what happened to cause it.

Curiosity as to what is going to happen leads you through a magazine story. But when you read a news story you want to know first of all **what happened**; and then your disire to know what made it happen carries you through to the end.

Have you ever listened to someone tell you about something that happened and start out with a lot of details and, after majoring in minutiae for five or ten minutes, finally get around to telling you what happened? By this time your attention has probably wandered several times and you're not really interested any more in what happened.

"What" is the most important of the newsperson's five Ws (What, Who, When, Where, Why/How) and you should answer "What?" in the very first paragraph. "Who?" may run a close second or even outrun "What?" in importance if the "who" of your story is a person known to a great many people or a person of great importance. But to make it news, the "What?" would still have to be there, even if it's only that "who" visited the local school district last week. (What? = visited)

The Lead

Besides "What?" answer the other four Ws in your lead paragraph if they are of sufficient importance. But do it concisely - they can be enlarged upon later.

Notice how the five Ws are all accounted for in the following lead:

> "Smithville College forensics student Jack Lawrence sold the judges on "Hitchhiking" and captured a silver medal at the National College Speech Association tournament held last week in Sacramento."

Who? Smithville College forensics student Jack Lawrence
What? captured a silver medal
Where? National College Speech Association tournament in Sacramento.
When? last week
How? sold the judges on "Hitchhiking"

The reason for getting the five Ws into the lead paragraph are:

1. It saves reader's time and, therefore, increases the likelihood of your message being read.
2. It is useful from the newspaper's point of view. Editors must select the most important from vast quantities of news items. It is sometimes convenient to reduce at the last moment the space assigned to a story when a more or equally important one breaks. Your story may be already in type, in the forms even, when a bigger story breaks. To make space, it is necessary to cut down the article in type. The make-up editor may begin at the bottom and take out all the paragraphs but the first, if necessary, and still the paper will present the essential facts of your story.

The lead we have just discussed is called the "Summary Lead." From the summary lead paragraph on, the story concerns itself with the interesting detail. Read any well edited daily newspaper and you will see this process clearly demonstrated. This is the conventional form of news writing. It is standard practice in construction of the greatest portion of the day's news.

But occasionally you will have material for a story that lends itself to a different and vastly more interesting form of treatment. These are the human interest, emotional appeal type stories. They are harder to write. Unless you have talent and/or training in this field, you might better "tell" your story to a local reporter and let him go with it. Reporters who like to write pictorially love to write human interest stories and editors delight in them.

Content

Pin-Point your message — The news media that serves your school district may include daily and weekly newspapers, free shopping guides (which sometimes carry stories), radio and television stations. You should send releases on important news to all of them, but not all of them should get every release you produce. More often the local newspaper would get a release when the radio station would not. You might send a list of three hundred graduates to your local newspaper, while the local radio station would use only a three-paragraph story on the graduation. Sending releases to media when it is obvious that they cannot use them wastes postage and sets up a throw-away syndrome for those media.

Regardless of the media you use, each release you write should be a pin-pointed message. Don't cover more than one story in a release. For example, don't write about new graduation requirements and the up-coming bond election in the same news release. Both stories relate to schools in general, but they are separate news items and should be treated that way.

Don't write in generalities. Be specific. Don't just tell your readers that your school offers a wide range of electives. Tell them what the electives are.

Write to inform - not to exhort. The public media have minimum standards for the information they use and how it is to be presented to their audiences. So if you want your news releases read, they must say something and say it well. Each release should be a complete news or feature story. As you write, imagine yourself a staff member of the newspaper or broadcasting station. Use no flowery adjectives. Be accurate in your facts and figures. Pay special attention to correct spelling of people's names. Don't editorialize. Make no undocumented statements. If opinion must be presented, it must be attributed to someone with authority to speak for your school district.

No newspaper editor wants to feel he is being used to promote your school's program. But through your careful observance of the **editor's** viewpoint, needs, and wishes, you may gain him as a proponent of your school district. If you can do this, the newspaper editor will gladly champion your programs and enlist the ardent support of the community for the schools.

Write for tomorrow. While editors and broadcasters are concerned about yesterday, today, and tomorrow, news of coming events has the edge over post mortems on yesterday's happenings.

When you use timely references, double check days and dates. Your release date should be the date on which the news media receive your release. Then a reference to "today" or "yesterday" or "this Friday" will mean the same day to the news editor as it does to you.

Use newspaper style. Most of the writing techniques covered in Chapter 1 of Section II of this text apply to news releases as well as letters, memos and bulletins. There are a few points that need to be emphasized when writing for the news media.

1. Releases should not be overly long. Do not bore your readers with minutiae. They are interested in WHAT happened, WHO did it happen to, WHEN, WHERE, and maybe WHY did it happen. They are not very interested in your opinion about the happening. That should be reserved for the editorial page or the "Letters to the Editor" column.
2. Keep paragraphs short. Each paragraph should deal with only one subject and that subject should be evident in the very first sentence.
3. Sentences should be short, but not all so short that the paragraph sounds jerky. Use the declarative sentence which tells something. (The Board will hold a public hearing on the budget on August 5.)
4. Be sure every sentence has a subject and a verb. Be sure the verb agrees with its subject in number and person.
5. Use all of the articles (the, a, an, etc.). They may be omitted in headlines, but must be included in your story.
6. Be specific. Don't say "next week." Say, "Next Tuesday, January 2."
7. Enliven your writing with action words. "The Board met in executive session." is better than "An executive session was held by the Board."
8. You can put your readers in a receptive mood by the tone with which you write your news release. Never strain for effect. Write in an every day, conversational tone; but be optimistic and enthusiastic. For example, compare the following paragraphs.

   The PTA of Main Street School will meet tomorrow night. There will be the usual business meeting at 7 p.m. followed by dessert and coffee. The president, Mrs. Mary Jones, will preside.

Main Street School PTA will get together at 7 p.m. tomorrow evening for their monthly business meeting. According to president Mary Jones an important item of business will be nomination of officers for next year. Dessert and coffee will be available for all in attendance.

9. How do you punctuate? You may have noticed that punctuation used in newspaper stories is different from what is considered correct in business letters. Each newspaper has its own punctuation style, but a carefully edited newspaper frames its punctuation statutes in accordance with substantially the following organic law:
   a. Determine a reason for every mark you use.
   b. Use just enough punctuation to make your sentence clear and easy to read, and do not complicate your writing with more. Too many marks are just as confusing as too few.
   c. Let your punctuation be uniform. It will be if you have a reason for every mark you use, and that reason is logical.
10. The Headline — It's debatable whether or not you should write the headline for your own story. If you do, don't expect or imply that the news media must use your headline. Provide it merely as a suggestion.

Feedback

What if the local newspaper doesn't use your release? If your release is not published within a reasonable time, there could be any one or more of several reasons:

1. You may have overrated its value.
2. It may have been delivered to the wrong person at the newspaper office.
3. It may have been delivered too late.
4. It may have been poorly written.

Be sensitive to your relationship with the news media. Occasional conversations with your local editors, news media executives, or reporters will give you insight into weaknesses of your operation. Don't hesitate to ask for suggestions and make changes. Remember, they don't HAVE TO publish what you give them.

TEN POINTS THAT WORK FOR QUALITY

1. Write news releases in a reportorial style. Don't editorialize or exhort the public; always attribute opinions or conclusions to an individual or group; and quote people where possible.
2. Keep news releases short, but check them for all-important details. Avoid releases longer than one page for radio and television stations.
3. Do not flood the media with too many story possibilities. Send out "tip sheets" inviting editors to call for more information if they are interested. Occasionally issue "for your information" background releases for future reference purposes.
4. Never give exclusive releases on major news breaks. However, be willing to work with news media on stories they may come up with on their own, and respect their exclusive rights to these.
5. Know what the reporters in your area are interested in and the kind of angles and features they look for. Then suggest to a reporter a subject that he can tackle with enthusiasm.
6. Inform news media of unusual photo possibilities as they occur. Or take a picture yourself to send with your release. Keep a current mug shot file on all Board members and administrators. TV stations prefer clear horizontal slides.
7. Use a duplicating method that results in clear and easy-to-read releases. Make sure a person other than yourself and the typist checks the release before it goes out. Pay special attention to the spelling of people's names.
8. Make certain there is sufficient postage on heavier-than-usual releases to avoid postage-due notices to recipients.
9. Hand carry releases to newspapers and broadcasting stations when it is obvious that the mails won't deliver them in time. Observe the deadlines of weekly newspapers.
10. Never call editors and insist indignantly on finding out why a particular release wasn't used or why the text was rewritten. Discuss your procedures occasionally with news media to see if they are satisfactory. If they are not, change them. Remember that newspaper editors are in the news-selling business, not the school-selling business. It is to your advantage to keep them on your side.

GUIDELINES FOR TAKING PICTURES

Michael Bower

1. All photographs taken for use in newspapers should be black and white only!! Color prints or slides are not acceptable for use in most newspapers.
2. Be sure to take your photograph "close up."
3. If possible, have your subjects fully engrossed in actual activity.
4. Try to use real props and materials.
5. Select a background or visible facility that is directly related to the project being photographed.
6. The best photograph is the one that tells a story without a caption.
7. Remember to identify all individuals in the photo.
8. Most newpapers prefer 8 x 10 or 5 x 7 glossy prints.
9. Have your photos printed for contrast.
10. Do not have a lot of people standing around looking at one or two individuals working on a specific project.
11. Unless you are taking a group or team shot, it is best not to have everyone "watch the birdie" or "say cheese."
12. Do not use paper clips or staples on photos.
13. Always include a caption with each photo submitted.
14. Do not write on the backs of photos. Use a separate piece of paper.
15. Remember, your news release can be greatly enhanced by good photographs.

Here is a sample News Release

CENTURY CITY UNIFIED SCHOOL DISTRICT

Contact:
Michael Bower
868-0431, Ext. 343

SLUG: COEDS NAMED TO YOUTH COUNCILS
For release: Immediately
Date: June 30

Division: District, 103-75

ATTN: WOMEN'S EDITOR

Two East High School coeds have been named to serve the youth advisory boards of regional stores for two of the nation's largest retail corporations.

Deborah Anderson, 16, and Elizabeth Simons, 16, were selected to serve on the teen councils of The Broadway Department Store and Sears, Roebuck and Co. respectively.

The youth councils are created to provide activities in education, fashion, entertainment and community service for young adults. Qualifications for membership as a teen advisor to the retail stores include 1) participation in school activities, 2) scholastic achievement, 3) good grooming and pleasant personality, 4) an interest in the retailing industry and 5) willingness to learn.

Each girl was selected for her post after an extensive screening process on her high school campus and participation in a series of interviews along with hundreds of other local high school students in the area.

More

COEDS NAMED TO YOUTH COUNCILS
103-75
Page 2

Youth council members are employed by their retail store and act as store representatives on their high school campuses and as fashion advisor to their classmates.

Both girls will be seniors at East High next fall and are active in a number of school events and programs. Debbie will . . .

-30-

GUIDELINES FOR PREPARATION OF COPY

Michael Bower

1. News releases must be typed double-space with one-inch margins at bottom and on both sides. Typist should leave three-inch margin at the top of the first page and a two-inch margin on the top of each additional page.
2. Each page should be ended with a complete paragraph. Never break a sentence at the bottom of a page.
3. If the release will take more than one page, type the word "MORE" at the bottom of the first page.
4. On subsequent pages, identify the news release as follows:
   2-2-2-2 Excelsior Club Day Nov. 6, 19 .
5. Be careful of punctuation, word-division, etc.
6. Check and double-check spelling, especially names.
7. Be sure to include **correct** titles of all individuals mentioned. A title used before a name is capitalized when it is part of the name. For example: "Superintendent Dr. John Somebody announced . . . " A title used elsewhere is not capitalized. For example: "Tickets will go on sale this week according to the principal."
8. "Mr." "Mrs." "Miss" or "Ms." need not be used in the first mention of an individual. Subsequent references can be shortened to use these titles. For example: "Janet Smith has been named as a National Merit Scholarship Finalist. Ms. Smith is a senior at John Glenn High School."
9. Be sure to list the full name of both students and teachers mentioned.
10. Be conscious of messy copy. Releases should be typed on plain white paper and should be "camera ready." Use one of the liquids or papers for corrections.
11. Numbers from one to nine should be spelled out while number 10 and above should be used in figures.
12. Sentences should never begin with a figure. The number should be spelled out. For example: "Six hundred parents were on hand for Open House."
13. When making reference to time, eliminate the "o'clock" or ":00".
    For example: "3 p.m.", not "3 o'clock"; and "11 a.m.", not "11:00 a.m."
14. The same rule applies for reference to money. For example: "$5", not "$5.00"; and "75 cents", not ".75".
15. The first mention of organizations in a news release should be the full name. Subsequent references can be abbreviated. For example, "The Parent - Teacher Assoc-

iation donated a new projector to the school. PTA President Mary Jones presented the gift . . . "

16. When a particular student is being recognized, it is proper to include the parents' name and address as part of the news release.
17. At the conclusion of each news release the figure "-30-" should be typed as a note to the editor that he has reached the end.
18. All other questions concerning usage, format, etc. should be in accordance with the Associated Press Style Book.

87

Chapter 4

WRITE CLEAR, CONCISE REPORTS

Virginia Mathony

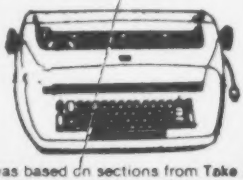
"A good report is judged in terms of the reader's needs."

Reports are not unusual in most offices in education and you may be the one responsible for gathering information for several reports during the school year. Secretaries and administrative assistants are given the responsibility of writing reports more and more, and many find it challenging and satisfying. You probably have assisted your administrator many times by gathering information for a report even though you were not totally responsible for it. In either case, you assume a degree of responsibility for the accuracy and completeness of the report.

Reports vs minutes

The terms minutes and reports seem almost interchangeable, but they are not. Minutes are made of meetings and often include reports; reports are also made of meetings and sometimes include minutes.

Minutes are taken so that there will be an accurate record -- an objective, chronological account of proceedings at a meeting. Reports have a different purpose: to inform! They must be accurate, but they need not be in chronological order and they need not be objective. A report provides information and can be used as an instrument of good will; it may help the receiver to administer, evaluate, or produce even though it does none of these itself.



Information in this chapter was based on sections from **Take A Minute, Save An Hour** and **Plan Your Work and Do It**, NAES publications now out of print.

Reports vary according to need

A good report is complete, clear, and accurate regardless of type, length, or format. A report can be defined as any form that conveys information. A written telephone message is a form of report.

Most reports are short and informal and many read like memoranda. Grammar and punctuation skills are important in all written reports and a good reference book should be kept handy. Occasionally, there will be a long formal report and that is when you may need to review footnotes, graphs, illustrations, typing format, and other rules. Most secretarial manuals give complete instructions for preparing reports.

As an educational office employee you might be sent by your school or your professional association to attend a conference or workshop with all or part of your expenses paid. If you are required to give either an oral or written report to the board of directors on your return, you will find helpful information in this chapter. However, it is important to remember to plan ahead and be prepared to take notes and collect printed materials during the conference to include in your report.

It is also well to remember that what you learned may also be helpful to your co-workers. So, include the many ways in which the conference helped you. What new ideas did you discover? Explain how you can apply them to your job and how you can share them with other employees. Point out the advantages of inservice training and fill the report with enthusiasm so your audience will know what it really meant to you.

PREPARATION IS IMPORTANT

Report writing is not easy but often appears to be more difficult than it really is. The key is to take it step by step, and the first step is to start. You might ask: "Where do I start?" You start by making plans. Sometimes the preparation may take longer than actually writing the entire report. But remember, the more thorough the preparation, the easier the writing. Here are some points to help you get started.

Define the Purpose

Every report has a purpose and some have more than one. However, the basic principle of all reports is to transmit information to those who need it in terms they will understand.

The person responsible for the preparation of a report will need to define the purpose first. If you are assisting your administrator, you will need to understand the purpose and scope of the report before you begin your part of the project. You will need to know who will be reading the report and for what it will be used. A check list will help to organize your planning. Don't let a short report deceive you; they often take more research than anticipated.

Prepare a calendar

A planning calendar will help you meet your deadlines. The person responsible for preparing the report should take the lead in making a calendar. On a sheet of paper, describe the assignment by listing the steps that are necessary to complete the project. You get these from your checklist. Then, estimate the time it will take to complete each step. Next, add a column for keeping a record of your actual performance time for each step. The information in this column will be of value when planning a future report.

Research for facts

A report is a compilation of information collected from various sources. This information may be found at libraries, in files, through observation, by asking questions, from notes taken at meetings or conferences, and from many other sources. Keep in mind the following steps when you do research.

1. Is the source well informed?
2. Is the source competent? Biased? Prejudiced? Reliable?
3. Is the information first-hand or some that has been passed from one person to another?
4. Are all dates checked for accuracy?

5. Have you investigated conflicting information from different people?

When several people research for one report, the work can be completed in less time. But care must be taken to deposit all findings with one person, and each person doing the research should sign or initial the information gathered.

Some information will come from your files; some of it may not. You will need to contact co-workers in other offices and in other areas of the school plant or in the community. Advance notice will allow them time to collect their thoughts as well as locate the data you need. Time your requests from others when it is convenient for them.

Courtesy is important when requesting information. First, explain your reason for asking by telling the purpose of the report and who it is for. Other employees may be reluctant to release information that could be interpreted improperly, and they have every right to question the use of information from their files. It's well to establish your own credibility before you ask.

Files can be a great help in preparing reports if they are well-kept files. In school offices many reports are completed monthly or at the semester's end, and still others at the close of the school year. Reports that are related can be set up with a cross reference system. It may take a little more time when filing, but it will pay off at the end of the year when an annual report is due. A cumulative system can be devised for information collected on a day-to-day basis that will be used again at the end of a month, semester, or year. Good filing habits are an asset in preparing reports. If you know where the information is filed, it is only a matter of pulling it from the files.

Make an outline

An outline with directional notes will help. Like a check list, it will help to organize your thoughts and put them in logical sequence. Valuable writing time can be saved through organization. A rough copy will serve the purpose -- just list the points to be covered and jot down a few words under each point as reminders of the facts to be included in that section of the report. It doesn't have to be an elaborate outline.

As information is collected, place it in well-labeled working folders according to subject matter, dates, or any other way that will make reviewing it more convenient. Some

of the material collected may have been recorded earlier on standard forms or sheets from other reports. Information from interviews and research can be recorded on cards for easy arrangement into related subject areas. The administrator who initiated the report may want to see each bit of information as it arrives. Check each entry for the name of the researcher before you place it in a folder. The person designated to collect the information will probably be the one to organize the data and type the first rough draft.

Determine the format

The kind of report determines the format. Informal reports are generally typed in letter form and have a heading, date, address, salutation, body, complimentary close, and signature. In a report the salutation may begin with "To"; the close is usually "Respectfully submitted."

If the report is to be in letter form, type the first page only on letterhead. Formal reports are more involved and detailed. They include a cover, title page, and table of contents, in that order. Sometimes the title page becomes the cover, but if a separate cover is used, the title page is the first page after the cover. Include the following information on the title page.

Title of the report centered and in all capital letters
Name and title of the person to whom it is submitted
Name and title of person by whom it is submitted
Date it is submitted

Spacing the title is important. If it needs more than one line, do not separate adjectives and articles from the nouns they modify; do not end a line with a conjunction; and use lower case for articles except when one begins a line in a title, then it should be initial capped.

A report of several pages with data that warrants special headings needs a table of contents, and it should follow the title page. The body of the report follows the table of contents and consists of an introduction, development of the subject, a conclusion, and finally, recommendations.

ORGANIZE YOUR RESEARCH MATERIAL

As soon as all the information is collected, take the many items from the folders and arrange them according to the aim of your report. As you select material from the research data, include only the pertinent items and discard all others. Researchers tend to collect more than needed and this is good as it may save a second trip to the library or to interview someone. It is easier to discard what is not needed than to search out more information.

Here is a pattern to follow that fits the needs of most educational groups: 1) Introduction, 2) Discussion, 3) Conclusion, 4) Recommendations.

Introduction: The purpose and aim of the report.

The introduction should be written in words that invite interest or action; words that explain the purpose and aim of the report; words that make the reader want to continue to read; and words that carry the sequence of the material in its proper order.

Discussion: facts and general information

There is no place in reports for personal opinions unless they are properly documented. Equal coverage should be given to more than one opinion and then let the reader make a decision. Pros and cons should be presented when the reader is expected to make a decision.

Statistics are a part of many reports, but if they do not prove a point, don't try to make them do so. They may be included for information only. Occasionally it may be necessary to make reference to material stated earlier in the report. If so, restate it so the reader doesn't have to stop and search for it. Take care to be concise, and only restate when absolutely necessary.

Conclusion: inferences drawn from material in the discussion

Don't leave the reader wondering. Present enough factual information so the reader will be able to build a strong conclusion.

Recommendations: proposed actions to be followed on the basis of the report.

If the purpose of the report is to recommend a change of any kind, the final paragraph should state clearly the recommendation. It should be a concise statement with no further discussion.

BEGIN TO WRITE

If it is difficult for you to begin writing, you are not alone! Don't search for the perfect opening statement. It will come later. Start any place in the report and keep writing. Allow plenty of space between lines and in margins for changes and corrections, for clipping sections of the first draft, and for rearranging or pasting up the second draft. Be selective in cutting and pasting -- keep the purpose of the report in mind at all times.

Type the rough drafts double or triple spaced so that corrections, additions, and delitions can be made clearly. The purpose of a report is to give accurate information the reader can use; it is not to impress the reader with writing style or word usage. Reports are concise and factual.

The most skillful writers know they will cut and add to their first draft. The report will be easier to write if you write with an easy flow of words and think about the content rather than your choice of words. There's time to correct the words when you have all the facts stated.

Read your report while the thoughts are still organized in your mind. Compare it with the outline and directional notes you made earlier and check that all important topics are included. Do not try to make major changes at this time.

When you are satisfied that all points called for in your outline are included, put the draft away until the next day. If time is short, put it away for a few hours and go to a completely different job. When you return to your report, you will see it in a different light and with a clear mind. This is the time to start adding, deleting, changing or cutting. Read it again and be very critical.

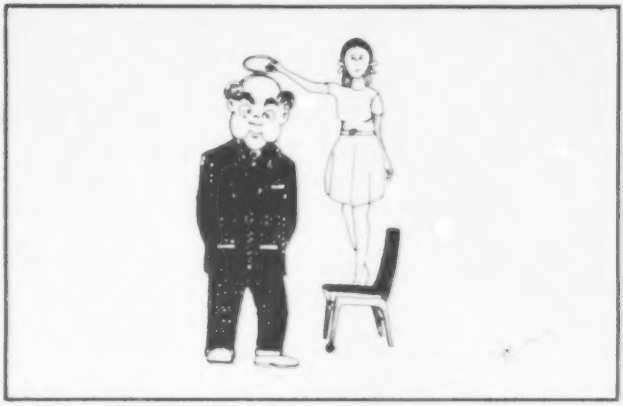
Evaluate your report

As you read, ask yourself these questions. Is it complete? Are all the facts included? Is it accurate? Have all the figures and dates been double checked? Is the wording so clear that there is no chance of the reader misinterpreting any part? Is it concise? If it is wordy, strike out information that doesn't contribute to the subject. Is it readable? Read it aloud to catch involved sentences. And, what about your responsibility? Would you take full responsibility for everything in the report? Don't ask someone else to sign it if you wouldn't sign it yourself.

If you have any doubts about the report, there is more work for you to do. A great deal of satisfaction comes from writing a report as long as you are willing to do the necessary work required to produce the kind of report that is needed.

Section III

GIVE YOUR BOSS A HALO



1. *Promote Your Boss's Philosophy*
2. *Support Your New Boss*

Chapter 1

PROMOTE YOUR BOSS'S PHILOSOPHY

Jean Faulkenberry

"As times change, attitudes adjust."

As the employee, you will certainly be expected to promote your boss's philosophy -- not as a "special feature," but as an unheraled part of your regular routine work day -- by your acceptance, action, and attitude. A portion of the definition for the word philosophy is, "the broad general principles of a particular subject; a reasonable attitude; accepting the things as they are and making the best of them; calmness."[1] This gives the directive that although everything may not be exactly to your liking, you must be willing to accept adopted policies. If you are in a supervisory position, you must see that these policies are enforced. Making adjustments is a trademark of an educational secretary; therefore, promotion of another's philosophy is an easy task if certain rules are applied.

Understanding is Needed

Complete approval cannot be awarded anything without understanding. It is your responsibility to study and know just what your boss's philosophy really is. Ask for clarification if there is any portion that seems vague. Communication is the key to understanding; so, all elements must be discussed to avoid misinterpretation. A need for some revision might be revealed through examination.

Challenges that are supported by sound reasoning can be very constructive in updating philosophy. As times change, attitudes adjust and methods improve. Philosophy should be reviewed and adjusted to keep pace with the times. Opinions of other people influence thinking and an educational office employee's insight may prove to be very valuable.

1. World Book Dictionary, Field Enterprise Educational Corp., Chicago, Ill., pp 1458.

Boss's Philosophy

Keep a written copy of the boss's philosophy and of all other established policies where you can easily reach them. When you are faced with one of the many decisions that must be made, and the many details that must be taken care of along with hourly interruptions, seldom is there time or energy to think about intangible things. For this reason, review those documents often and refresh them in your mind. You never know when someone may ask questions relating to a particular phase of the schools philosophy or policy. Refer to the written copy in your procedure manual rather than trust your recall. It is more authoritative to produce a document even if you can quote every word.

Keep Well Informed

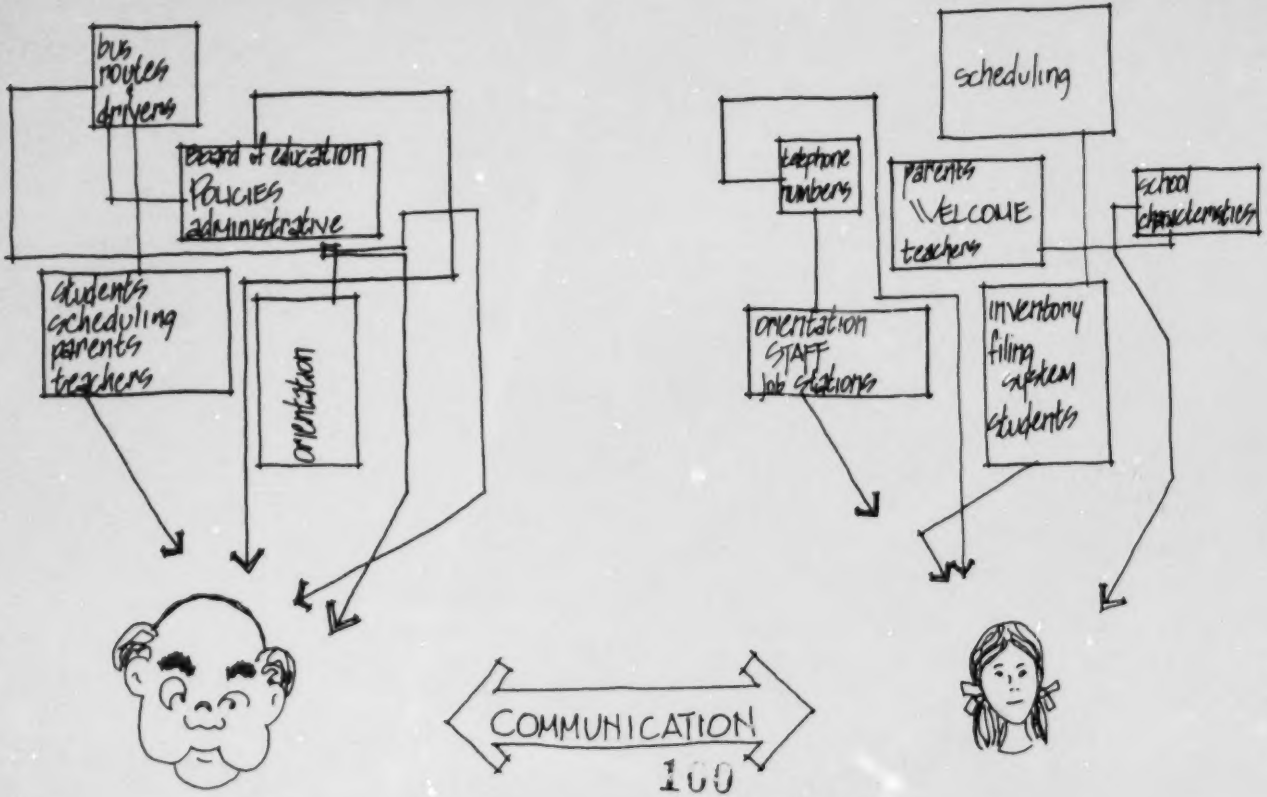
Keep yourself well informed of changes in policy. Busy people often assume that they have told you of changes. Here again, communication is the key and it must be a dual purpose key -- one that works in both directions. If you know that a study is being conducted, do not hesitate to ask if changes have been made and ask why certain aspects were adjusted. Keep your important reference material up to date; make all additions and deletions as they occur. Do not wait until later when you think you will have time.

As an important member of a working team, you may be asked for input in evaluating existing policies. Your contact with administrators, teachers, students, parents, and citizens of the community qualifies you to make recommendations. Your contact with these people is usually in a more relaxed vane and void of a great deal of the formality expected when they meet with your boss. They may feel more at ease with you and comment to you more freely than they will to an administrator. Through your wide range of experience, you have had the opportunity to see which policies are successful and which need additional study. Keep notes on suggestions, requests, complaints, and compliments that cross your desk. Have your file of notes handy so you can present it any time it is asked for.

You should not voice complaints about policy to outsiders, and only justified criticism should be relayed to your boss. This is the boss's philosophy and it commands your complete loyalty. By your attitude, you can completely destroy a policy's effectiveness or, with discretion, you can make the same policy succeed. Upholding your boss with

respect and cooperation is the strongest promotion feature you have in your power. Your mannerisms communicate for you and are far louder than any words; use them for achieving the ideal working relationship with your boss and the philosophy promotion will come naturally. Sincerity cannot be faked.

Just as policies are accepted, so must your boss be accepted. Don't ever attempt to change someone. A person and his or her philosophy are inseparable; they are so interwoven that there is a merger of self and beliefs. It is not for a secretary to point out weaknesses; rather, ask questions and be sure you understand.


bus
routes
drivers
board of education
POLICIES
administrative
students
scheduling
parents
teachers
orientation
scheduling
telephone
numbers
parents
WELCOME
teachers
school
characteristics
orientation
STAFF
job stations
inventory
filing
system
students
COMMUNICATION

Chapter 2

SUPPORT YOUR NEW BOSS

Jean Faulkenberry

"Communication cannot be over emphasized."

Apprehension and excitement grip you as you wait for the new boss to put in an appearance. The first day can be a trial or a thrill. You know that your attitude can set the tone! Is it positive? Have you completed all the needed arrangements for a smooth transition? Innovations are likely. Are you prepared to give a general introduction to the work handled in the office and to the procedures that are typical? Surely, you have not trusted your intuition but you have prepared written notes to guide you, or you may wish to present your procedure manual to the newcomer.

After your warm smile of sincere welcome, be prepared to acquaint your boss with details that will create a feeling of ease. Request an informal job orientation session. Find out what your new role is: exactly what is expected of you, from you, and what can be expected by you. On a typed list of employees, make notes relevant to the staff -- such as their specific job stations, home addresses, and telephone numbers. It will be well if you are prepared to answer questions, if asked, of a more personal nature such as their marital status, children, etc. No gossip, please! A roster of the board of education is a must.

If there is not a central switchboard in your building, have a list of intra-building numbers; district personnel numbers; community numbers such as fire department, police department, ambulance and hospital number, sheriff's station, news media. Tell your new boss where these numbers are located. Provide a map of the school district and of the community, clearly mark the location that a newcomer would most likely need to know and become familiar with quickly. Each school plant, just as each school district, has its own eccentrics and you can prevent a lot of tension by being prepared to point these out. Acquaint your new administrator with any pertinent facts pertaining to specific areas of responsibility in your office. Make sure keys are ready on arrival. Have them clearly marked and properly cataloged.

Policies should be divided into at least two categories: board of education policy and administrative policy. With any new boss, administrative policy will be subject to change. Accept it graciously since part of your job may be to enforce new rules. "But we've always done it this way" is not reason enough to resist any change. The administrator is in charge and you, the secretary, may need to change and adjust to the new way. Remember the new administrator is making a change also. Perhaps from a different city or state; from a small school district to a larger one; from a classroom in the same district to an administrative desk job. Both of you will need to adjust. You, the secretary, have been trained to adjust just as surely as you have been trained in your job skills. Keep all policies in writing and be completely knowledgeable of them.

Introduce the newcomer to all other personnel in your area. You might even want to try using name tags for a few days, especially if the staff is large.

Inform your boss

Although some other department may be responsible for complete inventories, do prepare a list of all equipment used in your office. Serial numbers, description, brands, location, company representatives, service contracts; use of each particular piece of equipment and who is authorized to operate machines; cost of equipment, current value and replacement estimates, and life expectancy should be included. An inventory of all supplies should follow the same pattern as the equipment inventory. Show your new boss where the supplies are stored and explain the procedure of requesting additional supplies.

Of major importance is the budget. Be prepared to explain how and when it is prepared and by whom. Do not be a stranger to your school financing program and its tax structure. Copies of these directives are available from the office that prepares them, so have some on hand.

Each filing system is unique. Even though you may be the only one who works with it, have a key available. Show your new boss where all files are located and explain the system you use. **File It Right** is a filing system developed for use in education offices. It can serve as an excellent guide for you. If your boss thinks your system is not adequate, work together to achieve an efficient solution.

A newcomer to the geographic area will benefit from city orientation. Helpful information will include a city map, data on industry, the economy of the area, historical facts,

census figures, churches, civic organizations, city and county officials, and available housing. Have brochures and reports with this information available when it is needed. Ranking high on the priority list is information pertaining to the community involvement and participation in school-related activities. If your school is one that permits public use of its facilities, advise your boss how arrangements are made. The new administrator will need to see the bus routes and meet the drivers.

Communication cannot be over emphasized. Ask your new boss if you are to open incoming mail. Ask if you are to take care of any of the mail, or all of the mail, or wait for daily instructions. Ask if you are to schedule appointments. Ask how much responsibility you are to assume. Ask what letter style is preferred. Ask if coffee is to be served at the desk. Don't rely on what you have been accustomed to doing. Granted you are a competent, capable secretary but you and your new boss need to have a very thorough understanding as to the extent and limitation of your authority before any problems are created.

Scheduling conflicts cannot be avoided unless all events: athletic, social, club meetings, assemblies, school board meetings, and other events are listed on an up-to-date master calendar along with the date, time, and facility needed. Many demands will be made on the time and energy of your new boss and you can help a great deal in conserving your boss's strength. Keep your own calendar current for immediate reference. New school personnel are often called upon for speaking engagements and press releases are requested. Have a press release prepared for the news media with an approved biographical statement and pictures. You will need a supply of these packets on hand for use of those entitled to them. If you are permitted to schedule appointments, avoid overdoing it. Every person must have some free time.

Even if your new administrator is an old acquaintance, do not behave in too familiar a manner. Always speak to and of your boss in a respectful, professional tone. A certain amount of formality is necessary to create the image the school's public demands.

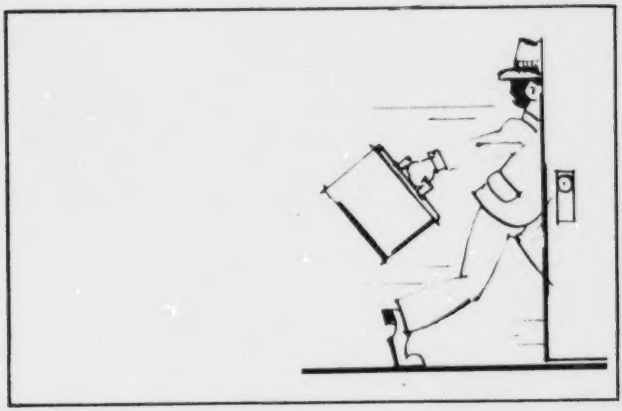
Never, never, even in your most innermost private thoughts, compare a new and former boss. Each one brings to a job specific abilities, unique talents, and a distinct personality. Each one deserves acceptance and recognition and respect for the achievement of individual performance.

The transitional period can be a very positive educational experience. In the process of acquainting your new boss and of getting acquainted, you will promote your own professional growth.

Support your new boss . . . it's part of your job.

Section IV

LEARN TO BUILD SELF-WORTH



1. *The Secretary and Human Relations*
2. *When It's Time To Move On*
3. *Turn Threats Into Opportunities*

Chapter 1

THE SECRETARY AND HUMAN RELATIONS

Erma Johnson Hawkins

"Good human relations begins with self."

The material in this chapter will deal basically with the principles and theories involved in understanding the relationship that should exist between the administrator and all office personnel, their behaviors, drives, skills, and personal qualities and characteristics.

One meaning of the word secretary is keeper of secrets -- a confidant. But, of course, it means a great deal more. Today, the word has a broader meaning which applies to a wide range of duties and responsibilities. It applies not only to the person who is the "right arm" of a busy administrator, but to persons holding such positions as stenographers, clerks, bookkeepers and all other related positions.

What is Human Relations?

When you think of human relations, many things come to mind: intergroup relations, interpersonal relations, interdependence, group dynamics, transactional analysis, or the complexity of relationships existing among working people. The term human relations is defined as understanding individual behaviors; the behaviors, drives and motivations of others; and the interdependence of all people who are employed.

The secretary (office personnel), like the administrator, should be aware that human relations is of utmost import-

ance if an educational institution is to succeed in its purpose. The entire education system is a world of people, and to get along with them, you, the secretary, must understand the intangibles in human relations: what motivates people; their feelings, their sentiments, and their satisfactions. You must appreciate their differences and elicit their cooperation.

In recent years, administrators have placed more emphasis on understanding the influence human relations has on the efficiency and well-being of their organization. Research has indicated that human relations has a tremendous influence on the operation of any organization.

Human relations is the application of all the behavioral science disciplines to the management of people. Various fields of psychology have provided a vast amount of insight into the relationship of people and their environment. Basically, sociology and psychology are the disciplines which make up the backbone of human relations, but this list is forever expanding to include other fields.

Sociology studies many facets of man and his working environment such as interpersonal relations, social change, stratification, values, social institutions, class stimuli, behaviorial patterns, and morale.

Psychology has provided a tremendous number of useful concepts which attempt to explain man's behavior. Some of these concepts are personality, aptitude, perception, motivation, and related characteristics.

Practically all disciplines have provided some information with relation to organization, communication process, and power struggles between groups and individuals. These fields also have contributed to the overall understanding of human relations as it relates to the administrative processes.

The most ensuing human relations movement was during the 1920's when the Hawthorne Studies were conducted by Elton Mayo and his colleagues. The focal point of the studies was the positive correlation between productivity and employee participation in the decisions affecting employees and their work. From this study, the worker was viewed as a human being with wants, desires, attitudes, and feelings vitally affecting productive usefulness. In today's office there is a process of combining human behavioral techniques with people for the mutual benefit of all.

Office personnel welcome the increasing emphasis of the human relations movement because the secretary can now be viewed as a person rather than a fixture. You can alleviate fears, frustrations, and anxieties and pay more attention to your efficiency and productivity on the job.

Efficiency and productivity are engulfed in a complex

organization which recognizes the person as a unique individual, one who must be motivated to do a job well, in addition to improving present performance. This is the point where the human relations factor comes in. It is up to the administrator to take the lead in discovering more meaningful and better ways to understand office personnel and how to help them achieve their maximum potential. The better administrators understand and apply the principles involved in human relations, the sooner they can reach their desired goal of maximum potential. Anything that is considered the boss's job must also be considered your job because the two of you work as an office team.

SELF WORTH

Philosophical Beliefs

Good human relations begins with self. You have to build a self that is worth knowing and respecting. Just as Arthur W. Combs said in his book, **Perceiving, Behaving, Becoming**, that an extremely adequate person seems to be characterized by an essentially positive view of self. People learn that they are not able, not from failure, but from success. A positive self concept is a must for you if you are to practice good human relations. You must feel good about yourself so you can feel good about others. Everyone in the school system may not like you, but they can respect and trust you if you conduct yourself in an appropriate and effective manner.

In order that the administrator and the secretary, as well as the entire office staff, can function as a team, it is necessary for the institution to have effective operating policies and objectives from a humanistic point of view. You must be sensitive to, and equipped to cope with the human problems involved in the office. People derive satisfaction from accomplishment, recognition, and participation. When you stand in a position between the administrator, the staff, and the public you are required to understand group and interpersonal relationships and be able to communicate effectively with a wide range of personalities in various positions.

Teamwork in any office is indispensable to the achievement of its goals. The office is a social system where

interdependence is the prime element. You and the administrator must work hand in hand with one another because one promotes the other and when one experiences success or failure, so does the other. You and your boss must push for the same goal.

Some Essentials in Human Relations

You, as the secretary, must be a competent and well-trained individual. Your functions in this position go far beyond normal, typical clerical operations. You must be able to do more than take dictation, write letters, answer the telephone, keep books, file or keep an appointment calendar. You must first get to work on time, be able to participate in the supervisory functions, and help make administrative decisions that affect the total educational system. You must be given opportunities to make use of your skills not only in administration but in human relations.

You need to know what motivates people and what causes them to act in a certain way; how they respond to and enjoy praise or a compliment. Regardless of what human relations is called, YOU play a major role therein. You are the one who smiles when a student, parent, businessman or co-worker enters the school building; you are the one who continues to wait on the salesman with a smile and a pleasant personality when he becomes boring with his sales talk; you are the one who radiates warmth and feeling when there is trouble with the heating or water system. Think of the days when you came to work when you did not feel like smiling at anyone, but you smiled anyway.

A number of firms, agencies, and school districts have gone to the word processing system and the position of secretary has taken on the image of a junior executive. The executive secretary knows how to get things done through other people and make things happen in the best way to reach desired objectives. The word processing center is a prime example of this.

What if, in this center, there are persons of different personalities and interests and these differences have created jealousy and friction among the workers to the extent that the work is never completed on time. Each person has to wait to get the next assignment and much time is lost. At this point, you, the executive secretary come in. You call the group together for a thrashing out of ideas, searching for a solution to the problem. Everyone is given an opportunity to

be heard and is asked to state the problem. After everyone is heard, there is a meeting of the minds and the problem is eliminated. The opportunity of talking it out helped. From that point forward you hold a weekly meeting to give the workers an opportunity to offer ideas and make suggestions. Productivity in the word processing center will increase immediately.

Leading a group to an understanding of a complex problem and securing cooperation in working it out is most fulfilling and rewarding to a secretary. But in order to accomplish this, you must have management and administrative skills. The first prerequisite is understanding people which is merely taking time to listen to those who will be affected by the decisions, or those responsible for carrying out a particular operation. It is your duty as the secretary in charge to know the what, who, when, and how of every facet of the operation and then be willing to help others.

HOW TO COMMUNICATE WITH CO-WORKERS

Communication and Interdependence

Communication, the process of transmitting and receiving information is a necessity to the existence of any institution, school system or organization. Every aspect of human behavior is related to the process of sending or receiving information. There has to be open communication between the administrator and all office personnel. There is gratification when responses are conveyed to you and to others in some form that your task has been performed well. Responses are not always communicated in the form of concrete physical behaviors; they may be in the form of an attitudinal response, the acceptance of an idea of the subsequent accomplishment (long-range) of a requested task.

Downward Communication

Office personnel may receive oral or written communication from their administrators. This is referred to as the downward dimension of communication. This is an essential dimension of transmission because without it the business of the school system would become chaotic. Therefore, objectives, policies, and procedures are relayed in this way. Even today, some administrators believe that the process of transmitting and receiving information means that they (the administrators) transmit and their secretaries or subordinates receive. However, it is important for you to remember that communication is inherently two-way in nature, regardless of the direction it takes -- upward, downward, or horizontal. However, the downward dimension of communication seems to be the most frequently used and relied upon in any organization.

You, as the secretary, may one day switch from the receiver of information, in the form of transcribing, to the transmitter of information in the form of dictating, because you could well have your own secretary one day. You must be prepared to meet the challenge!

Upward Communication

Upward communication is an equally important feature of the communication process. This is where the office workers, whose lives are affected by these communicated objectives, transmit concerns, feelings, attitudes, and opinions up to the administrator. A smooth flow of communication results in better human relations between the administrator and the office worker. When a potential disagreement begins to bloom, a thrashing out of ideas can offset an explosive result.

Horizontal Communication

Communication among various educational office workers on the same level is just as important. This is considered the horizontal dimension of communication where transmitting and receiving of information between departments or

people is on the same level. This dimension is absolutely essential to the successful operation of any office, for without it the various functions would not be coordinated.

Effective Work Pattern

When people have trouble getting along and understanding each other there is an indication that somehow they have been unable to create a satisfying and effective work pattern through open communication. There is a general feeling that communication is best when it is in response to natural interaction on the job among people who are learning appropriate trust; when it is in small groups or face-to-face situations; when it is asked for; and when it is among members who do not have great psychological or hierarchial distances. The most desirable communication thus tends to arise spontaneously out of situational demands.

Summary

In summarizing communication and its essential aspects, the basic theory is that communication is the element of human relations. For that reason, a study of communication could well begin with an examination of the problems at the reception of information -- that process by which one perceives what is said against a background of who said it. Sometimes your likes or dislikes, trusts or mistrusts will cause your version of another's words to be distorted by your personal opinions of the transmitter. It all boils down to feelings, attitudes, and desires - plain humanism.

In no office situation should there exist a dependency relationship but rather an interdependent one - a relationship where the dependency is mutual. Both the secretary and the boss have distinct personalities but the relationship between them must be one of compatibility. Even though some administrators may feel that having people look up to them satisfies their ego, they are in the minority. These administrators like to have individuals look to them for answers, rather than give them suggestions. However, there are

others who enjoy asking their secretaries for their opinions about various matters.

In an effective relationship of mutual dependency, there are two essential qualities: social sensitivity and behaviorial flexibility (the ability to accurately understand another individual and the ability to behave appropriately in light of understanding the other person) that must be considered. The administrator and the office worker must assemble vast amounts of knowledge about each other --why they are what they are, why they react as they do, to what environment forces they best respond, etc. This demands a tremendous amount of time and effort on the part of both persons, but this complete appreciation and understanding of each other yields a smooth, well-run institution because both have a mutual endeavor.

HOW TO RECOGNIZE THE NEEDS OF CO-WORKERS AND ADMINISTRATORS

Regardless of who they are, what they do or why they work, office employees and administrators alike, have basic needs: the need to belong; the need to be needed, the need to contribute. Recognition may be shown in many ways: praise of a job well done, financial rewards, advancement, additional challenging responsibilities or by just being friends.

In the work situation it is important that everyone feels a part of the team. No one wants to be an outsider.

There is a mission in every job. Just as a teacher gets satisfaction from contributing to the knowledge and growth of students, you, the office employee, get satisfaction from seeing the results of your labor used for the benefits of others. Contributing something worthwhile is the goal of every person.

If any one of these basic needs is not satisfied, problems in human relations develop. There is a need for you to be tolerant of others, which involves a high degree of acceptance of people as they are. This is a cornerstone of human relations in practice. It implies respect, tolerance, acceptance of human frailty and the recognition of the uniqueness of each human personality. However, this does not mean that the administrator has to condone irresponsibility, careless work, or self-indulgent laziness on the part of the secretary. The administrator should criticize the office

worker who displays the wrong attitude, but in so doing must keep criticism constructive. One prime function of criticism is to increase efficiency. When criticizing, ascertain all the facts in order to deal effectively with the problem. If learning and growth are two goals of criticism, then the **what** of the situation is more important than the **who**. If you criticize, do it in private and only after you commend the person for something. This method is most effective in working with people. If you, as the secretary, ask the boss to repeat some information, the boss should remember that you are trying to understand what is expected of you in order that you may do it right. Both boss and secretary should have empathy for one another.

A time may come when you will have more than one administrator for whom to work. Administrator No. 1 may ask you to do her work now because she needs it for a meeting and you are presently typing an urgent assignment for Administrator No. 2. You must decide which work has priority. You would read the material and then determine from its urgency which to complete first. If in reading the material, you discover that what you are doing is the more urgent and has to be completed first, then you have to use utmost skills in human relations and find the answer which will not offend Administrator No. 1 and will permit her to leave you with a smile. A response such as "I feel that this is more urgent and I must finish it now; however, I will get to your report next, which will be prior to the time of your meeting," should be sufficient if you say it in the proper manner and tone of voice. Administrator No. 1 will certainly appreciate your polite response and will not be offended.

113

Chapter 2

WHEN IT'S TIME TO MOVE ON

Jean Faulkenberry

"Your performance record will be remembered."

Sooner or later most working partnerships come to an end, and a boss-secretary, especially in the field of education, are partners. When a partnership dissolves, one member must leave the team. Varied emotions are involved and if your team effort has been unified and productive, then parting will be a matter of sincere concern for each of you. Consideration and courtesy can make parting a pleasant experience. Suggestions offered in this chapter are applicable whether departure is from the school system completely or is a transfer within the system.

If your boss is the one leaving, regardless of why, you must extend your sincere good wishes for the future, and then immediately start preparing to bridge the gap created by the departure. Request a briefing so that you will be aware of your position between the time one boss leaves and another arrives. The area of authority must be defined clearly for you and to you. Be prepared to accept the responsibilities that may become yours, but do not adopt authority that is not delegated to you.

Remind your departing boss that arrangements need to be made to forward mail to a new address and ask what telephone calls will need to be transferred. Offer to assist in packing personal belongings and check to see that nothing to be moved is overlooked.

More concrete action will be necessary if you are the one leaving. At least two weeks notice should be given so that a replacement may be obtained. You will make the same preparations for departure whether you leave by choice or not.

Complete as much of your work as possible. Leave very detailed instructions for the loose ends that cannot be cleared before you leave. Your replacement must know what reports are due, when they are due, to whom they go and where to find the necessary information. It will be helpful to have copies of completed reports from prior deadlines available as guides. The importance of a procedure manual cannot be over emphasized. If you do not already have one,

start working on one immediately, whether you are leaving or not.

Streamline your files and clean out all the clutter you have allowed to accumulate. Adequate data is necessary but you probably have collected much that is meaningful only to you. Your effeciency, dependability, and loyalty can be measured by what your files reveal. They are a review of your entire performance. A clear, self-explanatory code for your filing system is a must.

Bring your procedure manual up to date. If obsolete pages are to be kept rather than discarded, mark them plainly as to whether they are voided entirely or if a supplement has been added. If you do not have a procedure manual, leave a detailed job description and an updated calendar.

Make arrangements to have personal mail forwarded properly. Notify correspondents of your change of address. Leave information as to how your telephone calls are to be handled and which ones may be business or personal. Leave instructions as to how to contact you if necessary. Do not leave personal belongings behind expecting someone else to tend to your chores for you. Leave things the way you would like to find them if you were the replacement.

Your co-workers will not be impressed with repeated recitals of why you are leaving and where you are going, so don't bore them. More likely, they will be disgusted. The performance record you leave is what they will recall about you. This same performance record will follow you to your new job, too. Preparing your exit does not release you from loyalty to your employer. Work the last day on the job as though it were your first day.

Chapter 3

TURN THREATS INTO OPPORTUNITIES

"Think of Change as Growth"

Changes do come - how do you meet them?

Change can be a challenge or a threat depending upon how you meet and accept it. It comes in different ways, sometimes barely noticeable; again, it may be unexpected and jolt you out of a very comfortable routine. Enthusiasm for something new and different is not always shared by everyone. The important thing is how do YOU accept change?

If your established routine works well for you, you may not want any part of a new procedure or method and will close your mind to it. But what if you don't like the rut you are in and are looking for a new way? Then you are willing to study, think, and act on change. What if you recognize a real need for a more efficient way of performing your duties but you feel you are too rushed to take the time to study a new system or put it into operation? You have to take the time! When you find the right system, the time you will save after it is put to work will more than pay for the inconvenience of making the transition. Perhaps the reason you are rushed now is because the system you are using is cumbersome and takes more time than it should.

Don't be like the secretary who had to be told by her administrator that she was archaic because of her attitude toward changes in work procedure. This experience was unpleasant but it made the secretary aware that there were better ways to approach some office jobs and that she better find out about them. Be one step ahead of your administrator and you suggest the more efficient methods.

There are many opportunities to learn new procedures. Look around you for these opportunities; seek them out and introduce new techniques to your administrator and your co-workers. Read professional publications; take field trips with student groups when possible; visit community colleges and local businesses. Perhaps your local association can arrange a tour of a facility for one of your meetings. There are ways to see new procedures and equipment in operation and to let your administrator know that you are

alert to these ways and willing to do your job more efficiently. Keep alert to the possibility of being included in staff development plans and being able to attend instructional meetings such as workshops, time management seminars, conferences, business machine exhibits, etc.

To be aware of new developments and see how they work, softens the shock of change when it comes. One reason for resisting change is fear: fear of not being needed; fear of having to learn a new system; fear of not being qualified to learn the new system; and just plain fear of losing old, comfortable ways.

Who will make the choice in change?

Administrators have the final word in most cases, but are often too involved in their own administrative functions to give much thought to routine office procedures or even in making a selection of some new equipment. This is where you can speak out with authority. As the employee in the office who is most concerned with the workings of the office, you should be the specialist in this area and be ready to suggest which changes are needed, which equipment would do a better job. Perhaps you think there is no chance of your office ever getting some new, modern equipment because budgets in education seem to get tighter each year. Remember that it is necessary for equipment to be replaced when it wears out, and some day yours will wear out. So be prepared to recommend the right machine for your situation. Then, let your administrator make the final decision.

Arrange for a demonstration of new equipment. Yes, it does take time but it could prove a time-saver in the long run. Remember to include your administrator as well as all office personnel who might be affected by the change. Let them help during the study and thinking period.

Hold meetings periodically at which all administrators and office personnel attend. Meetings where everyone is free to introduce any topic that may concern the entire group. Procedures that overlap from one office to another or that may start with one secretary and be completed by another can be discussed so that a change will not be made unless it benefits everyone. It is helpful to be able to discuss problems or potential problems and let the group assist in establishing the procedure to be followed. And what a boost to your morale to know that your administrators recognize the importance of those daily duties that make up a large part of your day!

Procedures you are likely to be involved in

Through the years many changes regarded as threats turned into opportunities for office personnel. How many typists did the electric typewriter actually put out of work when it moved into the offices? Probably no one who was willing to accept the new machine and learn how to operate it.

There are other innovations that may have threatened you and your job because you did not understand them. Understanding is the key that opens the mind to new things. You may want to learn more about the following:

Word processing

Word processing (WP) is a system whereby modern, automated equipment transcribes letters, reports, memoranda, and other dictated documents. Many believe that word processing will soon rival data processing in importance. Although the concept started in the 1960's, there are many who would like to know more about the process. To some it means duplication; others think of it as another version of a steno pool with automatic typewriters, dictation, and transcription equipment.

A visit to a WP Center will tell you it is not a steno pool and you will marvel at the ease with which the personnel handle the volume of work. This equipment was developed from automated, self-correcting, programmable typewriters. That these machines have an output of 150-180 words a minute seems almost unbelievable. Text material is edited without retyping the entire copy and the memory bank holds a tremendous amount of information. What a change from the "Take a letter, Miss Jones" approach!

One of the most exciting potentials of the word processing system is that it offers challenging jobs at every level. More school systems and colleges are installing WP Centers and business education departments are requesting equipment so that classes can become a part of their curriculum.

New technology filters into education offices slowly. Be ready when it becomes a reality in your school system.

Reprographics

This consists of various processes for duplicating documents. It is an area where many changes have occured and new equipment introduced. Usually the office worker decides which type of machine is best for each job that needs to be duplicated. You can make these decisions easy for yourself by knowing how to prepare work for the equipment

available to you.

Have you considered doing a cost analysis of various methods of duplication which are available in your school system? If you have, you know the approximate cost for each copy you make on each machine you use. You have the information needed to explain why one method is better than another.

With all the photo copiers on the market, and copies so easy to make, it is a real temptation to copy everything. But you need to be realistic and establish some definite guidelines and determine which system is best for a specific job. Often the decision is made on the number of copies needed.

A photo copier is used for small runs, or longer runs when time is a factor.

Fluid process is good for runs of 100-200 copies. This includes masters made on any thermographic copier, azograph masters, or spirit masters.

Mimeograph is excellent for longer runs and stencils can be made on the typewriter, by hand, or they can be cut electronically. With care stencils can be stored and used over and over again.

Offset is best for a more professional look, when color is needed, for detailed art work, camera ready copy or typeset copy. Metal negatives are easily stored for future use. This book was printed by offset process.

Jobs requiring halftones or special binding processes are best turned over to the graphics department of your school, or given to an outside printer, but you should know how to prepare the copy and be knowledgeable in preparing paste ups and lay outs.

Micrographics

Micrographics is the use of microforms to store records permanently. One of the real frustrations of an educational secretary is trying to find storage space for all those records that must be kept. Microforms (microfilm, microfiche) are becoming more widely used so it is important for office personnel to understand the process and how to establish retention schedules, how to clear files of unnecessary information, how to prepare records for microfilming, and how to use various retrieval systems.

With a reader-printer in each school, microfilming can be done in a central location for all divisions and you can establish safeguards to ensure all records are properly microfilmed before the originals are destroyed.

The reader-printer is not difficult to use. When information is needed, you can either read the record from the machine or you can print a copy of it. No specially designed

room is required for its use.

Metric System

The metric system of measurement is the universal system and you must learn to think metric. Many items that you use in your office are being converted into metric measurements: paper, rulers, typewriter carriage, postal scales, thermostats, etc. You are already familiar with time and angle units which will remain the same: 60 seconds in a minute, 360 degrees in a circle.

The metric system is not difficult to learn. For use in everyday life, you will need to learn only 10 units. You will also need to get used to new temperatures. There are other units which most persons will not need to learn.

Basic Units

Meter: a little longer than a yard (about 1.1 yards)
Liter: a little larger than a quart (about 1.06 quarts)
Gram: a little more than the weight of a paper clip

Common Prefixes (to be used with basic units)

milli: one-thousandth (0.001)
centi: one-hundreth (0.01)
kilo: one-thousand times (1000)

For example: 1000 millimeters = 1 meter
100 centimeters = 1 meter
1000 meters = 1 kilometer

Ergonomics: the physical atmosphere of your office.

Does your office reflect an atmosphere of warm friendliness? Keep a warm friendly tone in mind and constantly be alert to making improvements. It isn't always easy when the office is in an old school building; but if you have a green thumb it helps. Keep some attractive plants growing. Visitors will comment on plantings, attractive bulletin boards, and other decorations. One secretary displays a small basket of homemade breads made by the cafeteria manager, then shellacked. It has been touched, pinched, and admired by dozens of visitors. A clerk in another office arranges student art work — a different grouping each month — to brighten the office.

Changes in Administration

Perhaps one of the greatest threats to you is when your administrator changes positions. You have worked together in a pleasant association and you may feel a bit apprehensive when you realize a change is imminent.

When there is change in administration, there may be a change in many procedures and in some policies. Your new administrator will appreciate your positive, happy acceptance of any new procedures. Make every effort to seek an opportunity, at the earliest possible moment, to discuss the many details you actually deal with.

You may find meeting a deadline is not the most important thing during these transition days. It may be that perhaps paper work should be set aside occasionally while a student has an opportunity to chat with the new administrator or while a teacher expresses some real concerns.

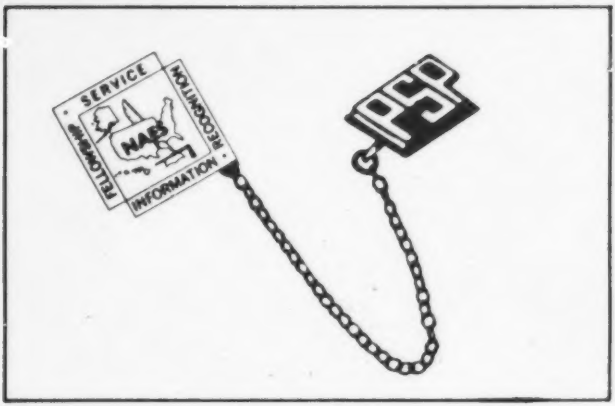
If the new administrator is a superintendent or a college president, the people in the community will also be concerned about changes. You will want to help create a school atmosphere that will welcome people; an atmosphere that will relate well to the entire community. To do this, you may have to temporarily set aside some of your routine assignments.

Job descriptions, too, may need to be updated; duties may be re-assigned; and this may result in changes for several office employees.

It is important to remember that the secretary does not establish policy. The secretary's role is to explain, remind, and reinforce the policies that the administration establishes. As you remember this, perhaps you can also remind your co-workers to accept change as opportunities for growth.

Section V

BE A PROFESSIONAL



1. *Be Your Own Person*
2. *Be A Professional*
3. *A Profile Of An Executive Secretary*

Chapter 1

BE YOUR OWN PERSON

Vivian Valentine

"Learn to rely on the correctness of your own judgement."

In each of you there is a bit of practicing analysis. Usually it's to decide about the other person's behavior. This is particularly true in an office where you work so very closely with other people who don't always do what you believe you would have done in similar situations. You enjoy figuring out why the other person acted and reacted in a certain way; if the other person really said one thing and secretly meant another.

Oftentimes it's more difficult to look at yourself — to really analyze your own personality including attitudes, problems, job possibilities, and relationships. This chapter is written in an effort to help you improve your potential for living as it tries to remind you of things you already know.

Who are you? What are you? Why are you here? Where are you going? Some days when it seems like the wheels are spinning and getting nowhere, you may have questions like these that cause you to pause briefly to determine if it's all worthwhile. But, you almost as quickly recognize that you are caught in the fast movement of the world's treadmill and there's not time to figure it out now. Let's take the few minutes you will need to read this chapter and make a decision that can influence every day of the rest of your life at home and at work.

You are unique

First, let's look at you because you are unique, meaning that nowhere in the universe is there a like or an equal to you. You're unmatched — single in your kind of excellence. Isn't it kind of fun to note the differences that make you unlike anybody else anywhere? It may be the way your hair grows just exactly right behind the ear, or with a special kind of "cow-lick" that you've never seen anybody else have. It may be a special way you can handle people in the office

without effort because you've always been able to listen responsively. Whatever it is, it makes you different and one of a kind!

You are honest

Right away, you who are different from everybody else should be honest — fair in your dealings with others, have integrity, be free from trickery, fraud or theft. It also means being "honest" with yourself — knowing what you can do and what you can't do, being the very fairest at accepting yourself at "face value." You often deal in half-truths when, for example, you say that a person is a rational being and then allow reason to be distorted by prejudice or overcome by passion. Generally, you find that natural impulses and feelings lead you toward goodness, but then you suffer from irresponsible and destructive egoism. You find it is not easy to be honest with your complex being.

You are healthy

It, therefore, becomes important that you regard yourself in several areas with the first being, of necessity, the physical well-being of your body. Are you healthy? You know that healthy means eating the right foods, sleeping the proper amount of hours, getting outside for exercise, and more than likely attempting to keep your weight where it should be, and having your teeth checked regularly! Great for you, because you now need to look at your body as a being in which all parts and organs are sound and in proper condition, where your intelligence and morals are also sound, and where your attitude is wholesome and free from the diseases that cause sickness of the emotions as well as the body. You've heard it said that 95-98 percent of all illnesses are tied directly to a person's emotions, that the obese person who worries all the time about a physical condition is not "really sick" -- just emotionally unstable! When you had a headache after a gruelling day at the office, when nobody would carry the load that you had to pick up, was it a health problem or just a case of resentment toward

the person who did not act as you felt would have been best? Best for whom? You or the other person? When you look at your health, know whether it's good or bad because of what you have allowed it to be.

You are self-confident

Self-confident you become when you take your uniqueness honestly and with a healthy attitude, learn to rely on the correctness of your own judgement. Can you really decide all by yourself what will look best to wear to the office party and not worry that you may feel ill at ease or that somebody may think you are not dressed right? Is it possible for you to believe you will be accepted for what your behavior is rather than the insecurity that comes from hypocrisy? In order to become your utopian success, you have to know where you want to go, that you have the qualities for getting there, and then believe confidently that you will make it.

How about the job assignment that you look at and wonder how in the world you'll ever get it done? At the same time you are saying, "Sure, leave it with me, we'll figure out a way and the time to handle it." And somehow from that time on, your main interest is doing what needs to be done in the best possible way.

It's no wonder then that you're considered for an advancement when it comes along, even though you may shrug off the promotion with the cliché, "Just lucky, I guess."

Inservice training, updating workshops, and conferences that relate to your job can do much to stimulate self-confidence. Attending such sessions can increase your knowledge, strengthen your weaknesses, and encourage you to keep on keeping on because there is a definite opportunity for you to serve well in the office where you have chosen to work.

Self-confidence gives way to acceptance of yourself and you become ABLE TO FACE LIFE. You need at this time to come to grips with the fact that you exist not from yourself but from God, and that you are able to do everything that you can do by using energies and abilities you have received as gifts from God. Your attitude then could be that of humility and gratitude to the source of your existence for being a part of the universe, for others who also are a part of the universe and important to your fulfillment and happiness, and for nature's exacting ways of constancy. Accept-

ing this tenet, you are then in a position to believe that you can, without doubt, handle whatever comes your way.

In a study by a team of University of Idaho investigators, under-graduate students were given a purpose-in-life test which showed that those who scored high on the test seemed to focus on the importance of peace of mind and spiritual values.

You know that peace of mind would make a happy person. You are right to use the "all is well" approach — you may find that you enjoy the Pollyanna view and honestly conclude that there really is no room for negativism.

Discover a self-image

Take a good look at what you've decided you are. If any part of this still seems foreign to you, go over it again just to see what's causing you not to accept what you are. Disagree personally with anything written in this chapter, but right now be realistic about your personality and your behavior.

The discovery of a self-image will allow you to change your personality and your behavior. You can put on a new face, take on a new life style, and become a new person--just like you want to be!

Develop a personality

The fact that you are an accident-prone, failure-type, or unhappiness-prone personality takes on new light as you think positively about those changes that are consistent with what you are going to be. Maybe you've said, "But I can't help it, that's just the way I am." Not so, you've been becoming that way because you wanted to, or simply because you did nothing to change.

If you wish you would smile more, then do just that--smile! How about not saying "tacky" comments? Just bite your tongue to keep them in. And when you make an error, start over again. You didn't learn to walk without falling. Replacing an ugly comment with a complimentary remark about the same person may take a little thinking, but it's worth the thought and the action that follows!

Create a healthy enthusiastic attitude

It could be that nothing is really good or really bad, it all has to do with what you think about it. Your first rule for creating an attitude is to use your imagination to set your goals. You are, as acknowledged earlier, capable of success in your role in life. You'll act and feel and perform what you imagine to be true about you and your world. When you believe your desk is as important to the school as any other part of its operation, when you accept the idea that you are the very best person for the job you have been assigned, and when you are enthusiastic about the work you can do every day, then you are going to find the results of your endeavors very satisfying. Each day will be a new challenge and every accomplishment will give you a happy reward.

The second rule is simply self-discipline. Since you were honest about yourself earlier--uncovering pet tendencies that you have but wish you didn't--the art of disciplining yourself can be mastered. Some things are right, others wrong. Know which one is right for you and stick to your guns! Hostility, guilt, self-consciousness, timidity, jealousy, and other self-pitying attributes come from inhibitions. An inhibition is a restraint that keeps you from expressing your real self. In exercising discipline these restraints are discarded and frustration removed. Nobody said it was easy!

The third rule is simple and age old: "If at first you don't succeed, try again!" Enthusiasm about your vocation and your attitude toward your daily work has probably had to be learned since you, like many others, chose what you believed you would enjoy most or be most interested in. You made your primary motive a self-centered one and service to others secondary and possibly just incidental.

Discard negative thoughts

Since you no longer have need for those negations, those inhibitions, anxieties, throw them out! Accept the premise that no one can do to you anything you won't let be done! A person can't talk down to you unless you permit it. Another secretary can't make you feel inferior unless you allow this to happen. Having established an open, honest mind, you can be comfortable among any group of people when you place deep within your conscious mind the idea that you are equal to anybody else in being unique, in having one or

more talents, and in having time in which to live. It's good to say emphatically that all types of work have dignity and no type of work undertaken from a motive of service should be regarded as inferior--even if you have been harboring the mistaken idea that you "just work in the office."

Set your goals

Now, is your mind clear? Fine, the cobwebs are disappearing, you're really somebody you respect, and you can set goals that you will achieve.

You can count on being very much like other people in many ways because human beings by nature have much in common. One function all humans have is goal-striving. That's why you are happier when you are working to accomplish--working to succeed. If your goal is to move forward, your intentions will be to "go through" whatever you face to reach that original goal. The goal should be reasonable to achieve so that the success factor can bolster you to set the next goal. Whether it be a goal of getting to work on time or making a speech in front of ten thousand people, or attending the Rose Parade, you need to make the decision--set the goal; make the decision--set the time; make the decision--how to reach the goal; and finally, make the decision--begin! From experience you have learned that when heavy demands fall on you, there is enough strength if you accept the challenge with confidence. That's a Bible promise: "As thy days so shall thy strength be."

Take off your coat and get to your work
Grin and decide you can do it;
Make up your mind you'll like what it is
And work until you get through it.

Live positively

You have heard the yell that most high schools use at some time or another when they say to a hard working group of players: "Come on team, sure you can do it! All you got to do is put your mind to it!"

It's really easy to be your own person when your thoughts are in that direction. **What you think** becomes what you are, and your self-image, self-respect, and self-confidence soar to new heights.

Your shackles of negative views have been put under lock and key along with the inhibitions that have caused stress and you can think positively about any situation. You see a glass half full instead of half empty. You ask for reimbursement from the travel account and are gratified when you get it, or you understand if the budget has already been expended. Your thoughts change your attitude about people which, in turn, causes behavioral changes that are desirable to you and appreciated by your associates.

Remember the "rubber tree plant" which the song says had high hopes! It lived positively as if nothing were more important than being a good rubber tree plant. And so it became just that!

The little red engine kept puffing as it seemed to say, "I think I can, I think I can" all the way to the top of the hill. It couldn't reach the top in one leap but it could chug slowly, determinedly, right up to the peak.

Since the world is still an unfinished task, there remains no room for delay. There is much to be done and only you can get it done. An English poet wrote that all he wanted in his living was a "tall ship and a star to guide it by."

Living to serve others is a Bible teaching that has been handed down to you by parents, teachers, and friends. The work ethics in this country would take another book to explain, but you know it well because you've been living with it. When there is a job to do, you do it, simply because there is that job to do. That's how you've helped elevate the standards of the office worker to the degree of professionalism that belongs to that special group of employees. And you feel good about it.

Just as the slightest breeze blows some bit of grass or grain of sand, so the smallest life that ever lives touches and influences to some extent any other life it touches. you never live alone; you don't walk alone; and your life, and the lives of those you touch, are either strengthened by or weakened by the association.

Live to serve others--influence follows you for years and years, not even death does away with influence. Life gives you time and space; it's up to you to fill it in service to

others. Probably the very reason you lighted your candle in education can be attributed to your desire to serve because any job in education effectively done must be one of service to others--with the student being the primary concern.

What about your first teacher? What about a special junior teacher? A Sunday School teacher? That lady in the office? The very time you needed somebody genuine and concerned...you looked again for the person who had proved that these important qualities of serving were available. Did you hope in some way to emulate certain characteristics that you enjoyed in these people?

Self-discipline

Finally, as a self-disciplined person, you can live one day at a time. You've looked at yourself briefly to evaluate how to be your own person. As you read have you thought of several changes that would be good? Did you think of a number of good qualities you are glad to have? You probably picked up rose-colored glasses and smiled at some things you wanted to overlook. Good! That's how to be a real person. You've passed the first requisite by accepting some, rejecting others, and overlooking still others. The second requisite is to do the same for the people in your world. Take them like they are and love them for what they are. If you take one day at a time you can do almost anything!

A word of caution: you need not expect it to be easy. You'll find times when you want to escape to a fantasy land and pretend that what you want is what you'll always get; and that you never will think anything that isn't best for everybody because it suits you. Don't run from life; handle it the best way possible - LIVE IT!

The real person -- **you** -- can think of "The Impossible Dream" and believe that you can do your best to fulfill your purpose in life. It may be a feat that nobody has ever been able to accomplish; it may be a place that nobody has ever been able to fill; it could be a discovery that nobody has ever made. It will be whatever it is that you are best qualified to do to make the world better because you have lived--and reached your full potential--your unreachable star!

Chapter 2

BE A PROFESSIONAL

Thomas F. Nolan, Jr.

"Sometimes the ingredient for success can be summed up in one word: TRY!"

"Sometimes the ingredient for success can be summed up in one word: Try!"

All educational personnel are encouraged to strive for professionalism and to help them the National Association of Educational Secretaries (NAES) offers a Professional Standards Program. The program is voluntary and was designed for NAES members who seek to achieve career advancement and professionalism.

The desire comes first and it must be your own desire, not one suggested by someone else. Next you need to make some decisions, set some goals. What are your goals? Where do you want to go? How will you get there? Why have you chosen these goals? You need to evaluate yourself to establish goals - the right goals for you.

After you have made your decision, you need some plans. How are you going to reach your goal? Where do you begin?

The best place to begin is with yourself. If you want to be a leader, you must first learn to lead yourself. If you want to be a better bookkeeper or secretary, you must enroll in classes designed for professional development and then earn recognition by using what you learn--not only in your office, but in your life.

The Professional Standards Program (PSP) is a strong guideline in the career of an educational office employee. If you accept this program as one of your guidelines and progress step by step, you are rewarded along the way by certificates of accomplishment.

One advantage to the program is that you can begin now; you do not have to wait for a certain date; you do not have to be at a certain point in your career. You can begin right where you are: as a clerk, typist, secretary, bookkeeper, or in any other position. You choose your subjects and progress at your own rate.

Choices are offered to candidates in this program and no one is easier than the others. One option is a testing program and those choosing this option must take tests prepared by NAES. Those who choose Option B must complete courses taken in adult education, business col-

lege, college, or university. Certificates are issued after specific requirements in education, experience, and professional activity are completed. Many school districts recognize these certificates and allow their employees an extra salary increment as they advance from one certificate to another.

There are several ways in which you can proceed in your quest for professionalism. You can seek out more information about your job and your school system and thereby become more valuable to your administrator. You can accomplish this through inservice training classes held either by your school district or by your professional association.

One of the important forces that help you reach your goal is self-motivation. Your desire to be a professional must be so strong that your motivation is constantly kept alive. This is not always easy. At inservice meetings and at your local association meetings you will find co-workers with similar aspirations. Studying with them will help strengthen and motivate all of you as you work together toward your goals. As you delve into your studies, you will gain recognition and encouragement from employers and peer groups.

Many colleges and universities offer courses in which educational office personnel can learn modern techniques that will help them work more efficiently. Prior arrangements with the registrar of the Professional Standards Program will allow you to use your earned credits from these classes toward a Professional Standards Certificate.

Life is made up of goals and you must set guidelines which lead toward the goals you set for yourself. First, you must be yourself. No one can be you. You are the only one who leads you, not Johnny or Joe, but YOU. You are the one who motivates you; the one who accomplishes your goals and receives the rewards that come with succes.

Membership in NAES is open to both men and women. There is an important role of active participation for men as well as women in all association activities. A man has to prove his identity by simply being what he is and having an ambition to serve and work in a predominately female profession and association. Most important is a willingness to become involved, to gain recognition and personal satisfaction knowing that he is part of the group with goals similar to his own.

A male secretary can prepare a cup of coffee for his boss as well as a female secretary. A male secretary can take dictation, transcribe notes, file, prepare reports, advance to a supervisor or administrative assistant, and even to an administrator as can a female secretary. The male secretary has an important function in the role of office employee

meeting all the challenges of today's changing world.

As a member of NAES men are encouraged to participate in all of its functions including workshops and conferences; to take part in leadership development programs; inservice training programs through your school district, college, or board of education, or your local, state and national professional associations. Men are also encouraged to attend continuing education classes, to earn college units, to read professional publications, and take advantage of all the opportunites that you can make available to yourself. NAES encourages each one of its members to become a professional by accepting professionalism as a goal and working toward that goal.

Life would be dull, indeed, without a challenge, and if you accept a challenge that other men and women in education offices have also accepted, if you can travel the road to attainment with them, you will find the travelling to be a pleasant learning experience. You belong to a group with a common purpose and you receive support from members when you belong to NAES. Along the way you will gain recognition from members, from co-workers, and from your administrator for the high office of responsibility you seek.

Chapter 3

A PROFILE OF AN EXECUTIVE SECRETARY

Erma Johnson Hawkins

"You must see people as they are and not as you want to see them."

The term executive secretary refers to the secretary behind the administrator. The position of executive secretary calls for knowledge more than simply how to take dictation, write letters, answer the telephone, keep appointment calendars or maintain the office files. The position calls for skills, actions and attitudes of greater complexity and sophistication than are needed in the usual secretarial positions. The time pressures at top levels almost inevitably bestow upon the secretary the role of "gate-keeper," a person who decides who will have access to the administrator and under what circumstance, either by correspondence, telephone calls or internal documents. The executive secretary is also a key part of the information and memory function of the administrator's office, which applies to verbal and nonverbal communications and sources of information.

Executive secretary is a term for persons handling varied functions. It is sometimes confused with such terms as stenographer or clerical worker. They are not the same, but the term is often used to designate not only the executive secretary but other office personnel as well. An executive secretary assumes more responsibilities for the work performed in an office; makes more independent decisions; often works with less direct supervision or guidance as various other office personnel; has all the abilities expected at the clerical levels as typist, stenographer, duplicating clerk, etc., plus other qualities and abilities and may even have a secretary.

Personal qualifications needed

Some of the more important characteristics needed by persons holding the position of executive secretary include, but are not limited to the following:

Personal qualities include not only your personal appearance such as good grooming, excellent posture, and good health but such other outward expressions of character as the way you act physically and emotionally; the way you talk; the way you listen; your versatility; your philosophy of life; and your willingness to help others.

Because you often speak for your employer; have noticeable influence on the attitude of others toward your boss, toward the boss's work, and toward the institution, you should have a well modulated voice and should enjoy meeting people in order to fulfill your important role in the area of human relations. In effect, an executive secretary is the public relations agent for the boss.

Competent executive secretaries should also like people, possess dignity, loyalty, poise, dependability, courage, patience, honesty, initiative, industry, and have the ability to use discretion and good judgement.

Skills needed

Executive secretaries work in an educational environment where ideas originate, where plans, promises, and agreements are made; where costs are estimated and recorded, and where paper records are kept. The environment in an educational setting is to serve not only students, teachers, and administrators but the public, parents, and the community. In order for the office to serve practically everyone, it is necessary that you have many and varied skills. In addition to having knowledge of general clerical and stenographic skills, you must have the intellect and judgement to do far more. You must understand the philosophy of the educational system, and what it takes to make it work. You must have the expertise to recognize and take advantage of opportunities; to assume new responsibilities; to adjust to unexpected situations. You may be responsible for relieving an administrator of many administrative details; for supervising other office personnel and for delegating responsibilities to help get the boss's job done. Therefore, it is important for you to know how to work with people and know what motivates people to insure maximum performance from them.

Executive secretaries will want to know how to take and record minutes of meetings, such as faculty meetings, faculty senates, and board meetings. An interesting and

important skill in aiding your administrator is researching and gathering data for speeches and reports, and the needed assistance in putting these and other written reports together.

If you want to be more competent in your position, you will want to continue to improve yourself, not only your personality but your skills as well. Personality is continually stressed because this one factor is a prime element in the area of human relations.

If you desire to be an executive secretary and do not have the necessary skills, then enroll in some refresher courses at a nearby university or educational center in your community. Be professional! Take advantage of every opportunity to strengthen yourself. The stronger you are academically and in your skills, the more self confident you are and this combination of confidence and intellect makes you more tolerable of others. Promotional opportunities seek out those persons who continue to improve themselves and those who keep abreast of constant changes.

You must develop a wholesome attitude toward authority, because regardless of how far up the ladder you go, you will still be subordinate to someone - be it principal, superintendent, the president of the board of trustees. Whether you are at the beginning level of performing clerical type activities, the second level of coordinating, directing or carrying out policies, or the third level of exercising your authority in helping determine policies and procedures, you are obligated to be emphatic to everyone. You must see people as they are and not always as you want to see them. You must understand that every person has desires, ambitions, fears, hopes, and dreams. As soon as this principle is put into application the educational systems in which you work will operate more successfully.

NAES . . .
WHAT IT IS AND WHO IT'S FOR

The National Association of Educational Secretaries (NAES) is the only national, professional association in the United States for personnel who are employed in the field of education. It is dedicated to the professional growth and recognition of office personnel as members of the education team.

The programs and services of NAES are far-ranging to satisfy the diverse interests, job assignments, and needs of the members. They are far-reaching in that the goal is to continue to raise the standards of the profession.

Membership is open to office personnel in all systems of education or organizations related to education. NAES offers six types of membership.

Active members must be office employees in the field of education. They pay dues annually and have all the privileges of membership: voting, holding office, and serving on committees.

Life members are those who have paid designated dues and they have the same privileges as an active member.

Retired membership is available to those who have been active or life members of NAES during the year prior to their retirement.

Associate members are those interested in advancing the purposes of the Association, but who are not eligible to be members in any of the above categories.

Affiliate membership is a group-to-group relationship between NAES and local, county or state associations of office personnel in education. Affiliation serves as a catalyst in the promotion of professional unity and recognition.

Institutional membership is open to school districts, colleges, universities, boards of education on local, county or state levels, and to other educational institutions that are interested in NAES as it relates to the employees under their jurisdiction.

NAES is governed by a Board of Directors elected by the members. The Board meets at least three times a year and members are assigned chairmanships. Throughout their term of office, chairmen study, research, and conduct special projects for the good of the membership and Association.

NAES provides a program of certification, an annual educational institute, at least three conferences each year, field service, a quarterly magazine, a quarterly newsletter for

affiliates, handbooks, office manuals, a scholarship and awards program, and group insurance for its members.

NAES, founded in 1934, was incorporated in 1969. It has a Code of Ethics which embraces a common purpose of dedication to the improvement of secretarial services to the schools and the community. Its four-point program of **Service, Information, Recognition,** and **Fellowship** is its main strength and points the way to professionalism.

NAES recognizes the unique role of the educational office employee and the important contribution each makes in the field of education. It, therefore, encourages all office personnel in the field of education to support its programs.

Requests for further information may be addressed to NAES, 1801 North Moore Street, Arlington, VA 22209.

ABOUT THE AUTHORS . . .

Barnes, Doris L.; Secretary to the Principal, Tabb High School, York County, Virginia; National Educational Secretary of the Year, 1975-76; Educational Secretary of the State of Virginia, 1975-76; holds a Professional Standards Certificate from NAES.

Bowers, Michael; Informational Specialist, Norwalk-La Mirada Unified School District, Norwalk, California; President, Michael Bower and Associates, Public Relations Consultants, Santa Fe Springs, California.

Faulkenberry, Jean; Secretary, Fort Stockton High School, Fort Stockton, Texas; First Vice President Texas Educational Secretaries Association; Editor "The Texas Secretary"; President Women's Division, Fort Stockton Chamber of Commerce; holds a Professional Standards Certificate from NAES.

Fleming, Janice; Secretary to the Assistant Principal, Palos Verdes High School, Palos Verdes Peninsula, California; President Los Angeles County Association of Educational Office Employees; Past President of California Association of Educational Office Employees; holds a Professional Standards Certificate from NAES.

Hawkins, Erma Johnson; Executive Secretary to the President, Alcorn State University, Lorman Mississippi; Service Editor "The National Educational Secretary" 1971-73; holds a Masters Professional Standards Certificate from NAES.

Mathony, Virginia; Coordinator of Publicity and Forums, Adult Education, Whittier Union High School District, Whittier, California; Editor "The National Educational Secretary," 1974-1976; Chairman NAES Publications Committee, 1975-1977; holds a Professional Standards Certificate from NAES.

Thomas F. Nolan, Jr.; Secretary, Business Office, Waterbury School District, Waterbury, Connecticut; State Membership Chairman for NAES; holds two Professional Standards Certificates from NAES.

Sullivan, Catherine M.; Secretary and Bookkeeper, Le Flore County High School, Itta Bena, Mississippi; Chairman NAES Bylaws and Standing Rules Committee; Recording Secretary NAES 1973-75; holds a Professional Standards Certificate from NAES.

Tramel, Mary; Communications Consultant and Seminar Leader; Free lance Writer; formerly Executive Secretary to the Superintendent, Norwalk-La Mirada Unified School District, Norwalk, California.

Valentine, Vivian Roberts; Administrative Assistant, Meridian Industrial Foundation, Meridian, Mississippi; Vice President Board of Trustees Meridian Public Schools and Community College; Past President National Association of Educational Secretaries; holds a Professional Standards Certificate from NAES.

Wood, Dr. Marion T.; Director of the Reading Dynamics Lab, Keene State College; Lecturer and Seminar Leader; Instructor at Catholic University (Washington, D.C.) Summer Sessions; Consultant to the Board of Directors, National Association of Educational Secretaries.

Index

Abbreviations, two-letter state, 44, 45, 46.
Agendas, codes for, 61, 64; outline, 62.
Adjust, adjustment, 95, 100.
Administration, changes, 122.
Attitudes, 54, 95, 96, 99, 106, 109, 113, 117, 125, 127, 129, 131, 137, 139.
Authority, 7, 53, 101, 115, 118, 139.
Batching, work, telephone calls, 8.
Behaviors, 105, 112, 125, 127, 128.
Books, reference, 9, 18, 19.
Bulletin boards, 121.
Bulletins, continuity, 35; format, 10; parents, 34; staff, 34; unity, 35.
Bylaws, 61, 65.
Calendar, system, 27; desk, 28, 101, 116.
Challenge, 3, 16, 24, 112, 117, 119, 129.
Change, 4, 96, 100, 117, 119, 135, 139.
Committee, minutes approval, 71.
Communications, listening, 53; written, 96, 97, 101; summary of, 111, 112, 137.
Complaints, 96.
Confusion, 55.
Criticize, 112, 113.
Data Processing, 119.
Deadlines, 7, 15, 17.
Decisions, 5, 11, 14, 24, 25, 96, 109.
Delegate, duties, 4; specialization, 12; responsibilities, 48.
Digestion, mental, 22, 23.
Disagreement, 22.
Effective, 14.
Efficiency, batching, 8; evaluation, 18, 106, 116.
Empathy, 113.
Envelope, addressing, 44; OCR, 43; abbreviations, 45.
Equipment, 100.
Ergonomics, 121.
Evaluation, annual, 14; 96, 132, 133.
Executive secretary, 137, 139.
Exit, from job, 116.
Fear, 5, 118.
File, filing, centralized, 24; cross reference, 15; code, 116; maintaining, 12, 116; memory book, 29; "no-file" system, 11; personal, 24; placement, 19; systems, 15, 18; tickler, 27, 29.
File It Right System, 17, 18, 68, 100.
Frustration, 7, 8, 13, 33, 129.
Functions, secretarial, 108.
Goals, 7, 24, 33, 107, 108, 112, 129, 130, 135.
Group dynamics, 105.
Grow, growth, 113.
Habits, 4, 8, 24.
Healthy, 126, 137.
Honest, 126.
Human relations, 105-114, 137.
Image, 101, 108.
Indecision, 5.
Indifference, 54.
Indigestion, mental, 22.
Information, informed, 9, 14, 88, 109, 115.
Innovations, 9, 99, 119.
Insecurity, 119.
Inservice training, 48, 127, 135.
Insight, 95, 106.
Interdependence, 105, 108, 109.
Interoffice communication, 48, forms, 49.
Interruptions, 4, 5, 8, 96.
Intuition, 99.
Inventory, 100.
Irresponsibility, 112.
Jealousy, 108.
Job descriptions, 125.
Judgement, 125.
Letter book, 8.
Letters, body of, 35, 37; capitalization, 42; closing, 35, 36; continuity in, 35; effective, 11; formulas, 41; goals, 33; guide letters, 48; model, 11; opening, 35; outline of, 35; paragraphing, 37; parallel construction, 37; positive construction, 37; purpose of, 33, 35; routine, 24, 25, 48; rough draft, 25, 26; screening of, 25, 50; style, 101; unity of thought, 35.
Library, reference, 9, 18, 19.
Listen, attentively, 51-55; importance of, 53; communication skill, 51; time, 109, 138.
Log your day, 3, 5;
Loyalty, 24, 25, 96, 116, 137.
Mail, 21, 28, 29, 50, 101, 115, 116.
Management, 109.
Mannerisms, 97.
Manual, reference, 96.

Index

Meetings, 5, 52, 109, 117, 118.
Memoranda format, 10; forms, 49.
Memory book, 29.
Metric system, 121.
Micrographics, microforms, 120.
Mimeograph, 120.
Minutes, action items, 59; agendas, 60, 61, 62; amendments to, 66; approval committee, 58, 65, 71; arrangement of, 67; attachments to, 65; board of education, 58; contents of, 65; corrections to, 65; distribution of, 70; faculty, 58; file, 68; format, 61, 72; how, 60; index, 65; index cards, 68; legal documents, 57, 58; minutes book, 59, 67, 68, 69; motions, card, 65, 66; motions withdrawn, 67; order of business, 60; organization of, 59; preparation of, 63, 67; recording of, 63; resolutions, 66,67; rough draft, 65; school board, 58; secretary's role, 59; sideheads, 67; what, 57; who, 58; why, 57.
Modifiers, misplaced, 38.
Motivation, motivate, 14, 15, 105, 106, 107, 108.
Needs, 112.
News writing, 75-84; content, 77; conventional forms, 76; copy guidelines, 83; editorial, 78; editor's viewpoint, 77; feedback, 79; feature story, 77; five w's, 75; headlines, 79; human interest, 76; lead, 75, 76; media, 77; picture guidelines, 81; punctuation, 79; sample news release, 82; style, 78.
Objectives, 107.
Offset, 120.
Opinions, 95.
Opportunity, 108, 109, 117, 139.
Optical Character Reader, 43.
Organize, self, 3, 5, 7, 11, 12; manual, 17, 106, 107.
Organizer, desk, 27.
Orientation, 99, 100.
Participation, 107, 134.
Partnership, 115.
Personality, 106, 128.
Performance, 115, 116.
Philosophy, 95-102, 137.
Photo copiers, 120.
Plan, 3, 118.
Policy, 96; 100, 107, 139.
Positively, 131.
Potential, 107.
Press releases, 101.
Pressures, relieve, 21.
Principles, 105, 107.
Priority, 3, 4, 5, 27, 101, 113.
Problems, 108, 109, 112, 118, 125.
Procedures, 4, 5, 13, 23, 99, 117.
Procedure manual, preparation of, 13-19, 96, 99, 115.
Procrastination, reasons for, 5; easy to, 12.
Productivity, 106, 109.
Professional, 12, 101, 131, 133, 134, 139.
Professional Standards Program, 133.
Proofreading, 46.
Proofreader's marks, 47.
Psychology, 106.
Punctuation, 42.
Purpose, for writing, 33.
Reading, slow, 6; training in, 51; speed, 52.
Records, time-saving, 29, 30.
Recognition, 107, 112, 133.
Relationships, 106, 125.
Reports, calendar, 87; conference, 86; due, 115; evaluate, 91; format, 89; organization, 90; outline, 88; preparation, 86; purpose, 87; research, 87; written, 139; vs minutes, 85.
Reprographics, 119.
Responsibilities, 7, 8, 12, 13, 30, 48, 99, 101, 105, 112, 115, 138.
Routing systems, 26, slips, 48, 49.
Secretary, executive, 137, 139.
Self-concept, 107.
Self-confident, 127, 131.
Self-discipline, 54, 129, 132.
Self-image, 128, 131.
Self-respect, 131.
Self-training, 54.
Self-worth, 107.
Sentence structure, 37, 38; expository style, 6.
Serve, 131, 137.
Specialization, 11, 12, 118.
Team, 107, 112, 115.
Techniques, 106, 117.
Technology, 51, 119.
Telephone, conversations, 30; incoming calls, 8, 21; long distance, 30; outgoing, 8.

Tension, 7, 21, 99.
Threats, 117, 119.
Time study, 14.
Transactional analysis, 105.
Typewriters, automatic 119; electric 48, 119; Mag card, 11; self-correcting 119.
Understanding, 95, 97, 105, 106, 107, 119, 127.
Unique, 15, 24, 100, 101, 107, 125.
Video taping, 52.
Word-processing, 48, 108, 109, 119.
Words, confusing pairs, 40; abbreviations, 39; educational jargon, 39; explicit, 40; precise, 40; pompous, 39; red flag, 40; right, 39; unnecessary, 38.
Work, files, 19; flow pattern, 9, 48; pattern, 111; routine, 5, 11; station, 18, 19.
Workshops, 118, 127, 135.
Writing, purpose for, 33; news, 75.

143

NAES Publications

File it Right and Find It. (Stock No. 171-11504) 1977 Edition
Offers essential information on records management to educational office employees and was prepared especially for use in educational offices.

An Instructor's Manual for Inservice Training (Stock No. 171-11502
Prepared to assist those who conduct inservice training programs whether in education, private industry or government. It includes basic guidelines for training instructors and workshop leaders.

Collective Bargaining - What Is It? (Stock No. 171-11506)
A collective bargaining manual for educational office personnel. This manual is not designed to meet specific problems, rather it is designed to be universal in scope. It outlines the process, defines terms, and provides a suggested sample agreement.

File It Right and Find It Slides, 1975 Edition
Available on loan for a fee to members of NAES or to professional associations.

The National Educational Secretary
A magazine, published quarterly, which features articles of interest to the profession. It is the official publication of the Association and is included with membership dues. Subscriptions are available to non-members, and libraries.

Crossroads
A quarterly newsletter for associations affiliated with NAES. Inciudes current developments in the profession and news from the affiliated associations. Available by subscription, also.

The Gavel Is Yours
A manual on leadership and parliamentary procedure. 1974 edition revised.

Orders for publications and slide rentals should be sent prepaid to National Association of Education Secretaries, 1801 North Moore Street, Arlington, Virginia 22209.